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Horticultural Products Review

EXPORT SUMMARY

U.S. exports of horticultural products to offshore destinations (destinations other than Canada*) in October totaled $329 million, 8 percent above the same month a year earlier. The increased export earnings in October largely are attributed to heavier shipments of fresh citrus, apples, pears, grapes, and dried fruit. Although shipments of all major types of fresh citrus were up in October, the rise was strongest for grapefruit. Strength in October's grapefruit movement was due to the earlier maturation of the Florida crop. The December freeze in Florida, however, resulted in a significant reduction in exportable grapefruit supplies which will lead to disappointing export earnings for the remainder of the season. The summary table for exports in October found in this publication shows a large gain in the canned vegetable category. This is a false indicator, with the increase due to a reclassification of commodities resulting from the U.S. conversion to the Harmonized Trade System.

(*Canada is excluded because U.S. export data to Canadian destinations are not accurate. Many export shipments to Canada are not counted.)

U.S EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD EXC. CANADA, OCTOBER-SEPTEMBER YEAR
OCT 89

NAME		QUANTITY					VALUE (000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT CITRUS	MT										
GRAPEFRUIT		16,469	25,440	16,469	25,440	453,581	7,563	13,021	7,563	13,021	220,228
LEMONS		13,615	12,643	13,615	12,643	130,615	11,966	12,317	11,966	12,317	91,637
ORANGES, INCL TMPL		8,308	11,712	8,308	11,712	274,497	4,655	7,736	4,655	7,736	159,921
OTHER CITRUS		840	223	840	223	15,404	653	208	653	208	9,591
Subtotal:----		39,234	50,019	39,234	50,019	874,097	24,838	33,284	24,838	33,284	481,377
FR, FRT, NON-CIT	MT										
APPLES		29,623	37,824	29,623	37,824	203,616	14,465	18,026	14,465	18,026	102,190
AVOCADOS		601	396	601	396	5,599	781	518	781	518	7,346
CHERRIES SWT & TRT		276	36	276	36	20,030	291	77	291	77	56,516
GRAPES		13,216	15,526	13,216	15,526	71,267	13,788	14,996	13,788	14,996	73,431
KIWIFRUIT		365	165	365	165	5,215	673	336	673	336	8,153
MELONS		1,209	994	1,209	994	19,185	671	525	671	525	9,605
PAPAYA		866	809	866	809	10,633	816	749	816	749	10,002
PEACHES & NCTRNS		330	586	330	586	12,081	237	371	237	371	7,194
PEARS		3,822	6,775	3,822	6,775	38,239	1,851	3,289	1,851	3,289	17,140
STRAWBERRIES		831	806	831	806	6,197	3,839	3,769	3,839	3,769	19,978
OTHER NON-CITRUS		4,262	2,671	4,262	2,671	54,562	6,037	3,018	6,037	3,018	48,541
Subtotal:----		55,405	66,592	55,405	66,592	446,628	43,453	45,680	43,453	45,680	360,101
CND/PREP FRUIT	MT										
CHERRIES TRT CND		387	1,083	387	1,083	5,600	518	1,324	518	1,324	7,669
FRUIT MIXTURES		1,916	1,904	1,916	1,904	16,891	2,228	1,994	2,228	1,994	17,956
MARACHINO CHRY		261	195	261	195	2,189	505	346	505	346	4,089
PEACHES CANNED		2,300	1,229	2,300	1,229	16,341	2,089	1,360	2,089	1,360	15,263
PINEAPPLE CANNED		396	131	396	131	5,217	423	128	423	128	4,905
FRT PREP/PRES		2,367	2,395	2,367	2,395	27,934	2,904	2,608	2,904	2,608	29,717
OTHER CANNED FR		938	2,079	938	2,079	16,623	1,236	2,118	1,236	2,118	18,848
Subtotal:----		8,568	9,018	8,568	9,018	90,798	9,906	9,880	9,906	9,880	98,451
DRIED FRUIT	MT										
PRUNES, DRIED		7,071	8,322	7,071	8,322	54,392	10,975	12,032	10,975	12,032	88,316
RAISINS, DRIED		8,187	7,999	8,187	7,999	90,598	12,452	13,357	12,452	13,357	137,141
OTHER DRIED FRUIT		770	1,047	770	1,047	9,807	1,962	2,146	1,962	2,146	19,213
Subtotal:----		16,030	17,369	16,030	17,369	154,798	25,390	27,535	25,390	27,535	244,671
FROZEN FRUIT	MT										
BLUEBERRIES, FZN		685	231	685	231	6,499	385	295	385	295	3,823
STRAWBERRIES, FZN		612	555	612	555	8,032	713	685	713	685	8,871
OTHER FZN FRUIT		954	810	954	810	7,466	1,145	875	1,145	875	9,772
Subtotal:----		2,253	1,597	2,253	1,597	21,999	2,243	1,856	2,243	1,856	22,467
FRT&VEG JUICE (SSE)	KL										
GRAPEFRUIT JU CNC		1,888	1,019	1,888	1,019	37,978	998	603	998	603	23,601
ORANGE JU NT CNC		2,182	1,179	2,182	1,179	40,726	936	446	936	446	18,516
ORANGE JUICE CNC		7,193	12,272	7,193	12,272	160,086	3,606	5,784	3,606	5,784	77,505
OTHER JUICES		14,088	11,171	14,088	11,171	188,523	5,352	5,698	5,352	5,698	102,329
Subtotal:----		25,353	25,642	25,353	25,642	427,315	10,895	12,533	10,895	12,533	221,952
VEGETABLES FR	MT										
ASPARAGUS, FR, CHL		5	1	5	1	9,158	26	2	26	2	26,560
LETTUCE, FR, CH.		1,575	1,787	1,575	1,787	27,163	729	732	729	732	11,902
ONIONS, FR		12,320	13,433	12,320	13,433	49,039	3,519	3,326	3,519	3,326	13,721
TOMATOES, FR, CH.		370	193	370	193	4,819	237	142	237	142	3,492
OTHER VEG, FR.		8,719	9,977	8,719	9,977	82,095	6,279	7,487	6,279	7,487	64,875
Subtotal:----		22,991	25,392	22,991	25,392	172,276	10,792	11,692	10,792	11,692	120,553
VEGETABLES CANNED	MT										
CATSUP & CHILI SA		845	1,125	845	1,125	11,165	626	896	626	896	8,832
SWEET CORN CANNED		11,774	14,214	11,774	14,214	97,511	9,792	11,929	9,792	11,929	79,030
TOMATO PASTE		430	1,515	430	1,515	4,864	453	1,750	453	1,750	5,078
TOMATO SAUCE		260	6,476	260	6,476	14,952	243	4,577	243	4,577	13,434
OTHER CANNED VEG.		3,914	8,485	3,914	8,485	78,425	4,091	11,166	4,091	11,166	101,934
Subtotal:----		17,224	31,816	17,224	31,816	206,919	15,208	30,319	15,208	30,319	208,310
VEGETABLES FZN	MT										
F FRY FZN		12,413	11,791	12,413	11,791	140,635	8,678	7,568	8,678	7,568	91,991
FZN SWT CORN		4,236	4,911	4,236	4,911	52,315	3,329	3,876	3,329	3,876	39,646
OTHER POT. FZN		1,498	1,369	1,498	1,369	17,264	1,078	1,170	1,078	1,170	15,110
OTHER FZN VEG		4,817	4,523	4,817	4,523	48,171	3,984	3,881	3,984	3,881	45,824
Subtotal:----		22,966	22,595	22,966	22,595	258,387	17,071	16,497	17,071	16,497	192,572
DEHYD VEGETABLES	MT										
GARLIC DEHY		179	398	179	398	4,561	368	829	368	829	9,087
ONIONS DEHY		1,604	1,287	1,604	1,287	19,128	2,705	2,800	2,705	2,800	34,796
POTATO DEHYD		2,045	2,407	2,045	2,407	22,305	1,461	1,993	1,461	1,993	19,351
OTHER DEHY VEG.		1,565	1,122	1,565	1,122	19,721	2,489	1,604	2,489	1,604	23,289
Subtotal:----		5,395	5,215	5,395	5,215	65,718	7,026	7,228	7,026	7,228	86,524
TREE NUTS	MT										
ALMND SH/PREP		21,802	16,692	21,802	16,692	150,476	65,956	48,363	65,956	48,363	474,300
ALMONDS, UNSHLD		2,780	962	2,780	962	13,300	5,198	2,453	5,198	2,453	30,540
PISTACHIO, UNSHLD		146	189	146	189	4,004	641	1,012	641	1,012	14,510
WALNUTS, SHLD		1,704	2,668	1,704	2,668	11,377	4,771	5,990	4,771	5,990	28,681
WALNUTS, UNSHLD		24,885	31,177	24,885	31,177	45,535	39,465	51,966	39,465	51,966	72,395
OTHER NUTS		1,912	2,157	1,912	2,157	14,809	5,651	5,525	5,651	5,525	43,002
Subtotal:----		53,230	53,848	53,230	53,848	239,503	121,686	115,312	121,686	115,312	663,431
NURSERY PRODUCTS	NONE										
CUT FLOWERS		0	0	0	0	0	588	557	588	557	5,162
OTHER NURS, PROD.		0	0	0	0	0	4,373	3,366	4,373	3,366	45,800
Subtotal:----		0	0	0	0	0	4,961	3,924	4,961	3,924	50,963
HOPS & PRODUCTS	MT										
HOP EXTRACT		230	491	230	491	2,554	2,817	3,410	2,817	3,410	33,647
HOP PELLETS		35	56	35	56	8,345	150	1,081	150	1,081	21,917
HOPS, NSFP		241	162	241	162	1,491	949	1,115	949	1,115	8,615
Subtotal:----		506	711	506	711	12,391	3,917	5,607	3,917	5,607	64,180
WINE	KL										
GRAPE WINES		3,767	5,226	3,767	5,226	49,700	5,534	7,344	5,534	7,344	69,899
OTHER WINE PRODUCT		243	161	243	161	9,453	305	182	305	182	5,202
Subtotal:----		4,010	5,388	4,010	5,388	59,153	5,839	7,527	5,839	7,527	75,102
Grand Total:							303,231	328,879	303,231	328,879	2,890,662

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD SUMMARY, OCTOBER-SEPTEMBER YEAR
OCT 89

NAME		QUANTITY					VALUE (000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
APPLES		7,447	9,801	7,447	9,801	116,285	2,284	2,878	2,284	2,878	48,382
AVOCADO		1,332	1,349	1,332	1,349	4,524	1,058	1,224	1,058	1,224	4,078
BANANA		236,728	258,572	236,728	258,572	2,869,739	63,850	73,535	63,850	73,535	795,277
CANTELOUPE		362	83	362	83	218,401	81	16	81	16	72,174
GRAPE		3,830	641	3,830	641	280,754	776	278	776	278	217,842
KIWIFRUIT		121	17	121	17	19,869	316	29	316	29	18,598
MANGO		79	58	79	58	52,219	77	72	77	72	42,558
PEACH		67	22	67	22	45,391	38	15	38	15	30,449
PEAR		2,271	1,510	2,271	1,510	39,943	5,396	3,555	5,396	3,555	25,052
PINEAPPLE		5,938	8,802	5,938	8,802	92,141	2,334	4,196	2,334	4,196	38,108
RASPBERRY		48	8	48	8	9,169	103	44	103	44	15,681
STRAWBERRY		255	223	255	223	16,334	337	552	337	552	18,526
OTHER MELON		96	522	96	522	101,802	53	224	53	224	32,374
OTHER FRUIT		31,063	22,451	31,063	22,451	436,377	12,119	5,718	12,119	5,718	117,992
Subtotal:----		289,642	304,067	289,642	304,067	4,302,956	88,829	92,342	88,829	92,342	1,477,097
DRIED FRUIT	MT										
DATE		142	164	142	164	10,049	173	186	173	186	9,572
DRD APRICOT		1,276	976	1,276	976	7,372	2,596	2,037	2,596	2,037	16,276
DRD FIG & PASTE		1,541	1,460	1,541	1,460	5,419	2,530	2,300	2,530	2,300	7,309
RAISIN		1,580	1,456	1,580	1,456	10,598	1,388	1,301	1,388	1,301	9,714
OTHER DRD FRUIT		929	1,338	929	1,338	22,831	1,393	2,653	1,393	2,653	23,889
Subtotal:----		5,470	5,396	5,470	5,396	56,271	8,082	8,479	8,082	8,479	66,762
FROZEN FRUIT	MT										
FZN RASP		54	265	54	265	3,203	132	324	132	324	4,746
FZN STR		673	202	673	202	20,839	403	166	403	166	13,154
OTHER FZN FRUIT		555	771	555	771	8,089	905	1,445	905	1,445	11,345
Subtotal:----		1,283	1,240	1,283	1,240	32,131	1,441	1,935	1,441	1,935	29,246
CND/PREP FRUIT	MT										
CANNED PEACH		4,116	4,661	4,116	4,661	50,435	2,683	3,008	2,683	3,008	32,644
CANNED PEAR		106	121	106	121	1,218	50	73	50	73	756
CANNED PINEAP		18,295	0	18,295	0	214,390	10,759	0	10,759	0	126,524
MIXED FRUIT		1,105	1,506	1,105	1,506	18,700	682	1,167	682	1,167	13,975
PREP/PRES FRUIT		5,829	16,612	5,829	16,612	150,729	5,491	25,241	5,491	25,241	210,401
OTHER CND FRUIT		15,296	11,198	15,296	11,198	136,156	20,687	17,719	20,687	17,719	192,304
Subtotal:----		44,749	34,099	44,749	34,099	571,631	40,354	47,210	40,354	47,210	576,606
FRT&VEG JUICE (SSE)	KL										
APPLEPEAR JU		89,903	54,638	89,903	54,638	942,315	19,987	11,297	19,987	11,297	195,193
FCOJ		161,517	124,912	161,517	124,912	1,110,287	61,249	33,557	61,249	33,557	383,758
GRAPE JU		6,574	5,876	6,574	5,876	62,114	1,390	1,397	1,390	1,397	15,086
PINAP JU		13,573	15,886	13,573	15,886	251,522	2,586	3,228	2,586	3,228	47,881
OTHER FRUIT JU		5,754	34,801	5,754	34,801	413,601	4,884	12,328	4,884	12,328	154,243
Subtotal:----		277,323	236,115	277,323	236,115	2,779,840	90,097	61,810	90,097	61,810	796,164
VEGETABLES FR	MT										
ASPARAGUS		662	1,016	662	1,016	14,833	959	1,383	959	1,383	18,006
BEAN		363	33	363	33	13,704	271	52	271	52	13,034
BELL PEPPER		1,195	3,655	1,195	3,655	102,086	1,283	4,578	1,283	4,578	76,754
CARROT		9,371	7,574	9,371	7,574	53,165	2,295	1,502	2,295	1,502	12,204
CHILI PEPPER		1,033	443	1,033	443	30,994	562	288	562	288	26,268
CUCUMBER		1,583	2,461	1,583	2,461	192,544	730	1,107	730	1,107	79,511
EGGPLANT		3	9	3	9	17,232	2	26	2	26	8,573
GARLIC		53	1,419	53	1,419	13,771	82	1,230	82	1,230	11,824
LETTUCE		53	69	53	69	26,848	44	56	44	56	9,291
ONION		3,689	5,364	3,689	5,364	157,717	2,755	4,204	2,755	4,204	66,295
POTATO, INCL SD		16,057	20,157	16,057	20,157	285,378	2,849	3,718	2,849	3,718	61,959
SQUASH		1,819	1,726	1,819	1,726	75,428	651	524	651	524	34,510
TOMATO		19,433	29,062	19,433	29,062	365,850	6,743	13,930	6,743	13,930	212,151
OTHER FRS VEG		17,130	16,403	17,130	16,403	266,222	6,810	6,917	6,810	6,917	128,506
Subtotal:----		72,450	89,399	72,450	89,399	1,615,777	26,042	39,522	26,042	39,522	758,891
VEG CANNED/DEHYD	MT										
CND ARTICHOKE		948	1,624	948	1,624	15,280	1,941	3,180	1,941	3,180	30,556
CND MSHROOMS		2,724	3,840	2,724	3,840	53,359	6,455	8,976	6,455	8,976	128,899
CND PIMIENTO		349	991	349	991	8,428	477	1,025	477	1,025	10,598
CND TOM		9,115	3,965	9,115	3,965	65,639	5,414	2,195	5,414	2,195	38,927
TOM PASTE		5,054	5,829	5,054	5,829	107,260	3,724	4,827	3,724	4,827	97,511
TOM SAUCE		323	52	323	52	2,462	207	28	207	28	1,396
DEHYD VEGETABLES		10,730	8,803	10,730	8,803	121,319	7,094	8,616	7,094	8,616	98,747
OTHER CND VEG		15,658	16,937	15,658	16,937	202,173	13,963	13,526	13,963	13,526	170,067
Subtotal:----		44,906	42,044	44,906	42,044	575,924	39,278	42,378	39,278	42,378	576,705
VEGETABLES FZN	MT										
BROCCOLI FZN		4,941	0	4,941	0	17,440	2,900	0	2,900	0	10,930
CAULIFLOR FZN		2,977	0	2,977	0	8,835	1,825	0	1,825	0	5,755
OKRA FZN		427	0	427	0	671	283	0	283	0	412
POTATO FZN		4,706	4,654	4,706	4,654	44,879	2,259	2,465	2,259	2,465	22,984
OTHER VEG FZN		5,097	3,389	5,097	3,389	50,292	4,175	3,264	4,175	3,264	46,545
Subtotal:----		18,150	8,043	18,150	8,043	122,119	11,444	5,729	11,444	5,729	86,627
TREE NUTS	MT										
BRAZILS TOT		404	1,178	404	1,178	6,339	996	2,547	996	2,547	16,824
CASHEWS TOT		3,580	4,607	3,580	4,607	46,334	16,915	19,166	16,915	19,166	209,929
FILBERTS TOT		376	554	376	554	4,777	1,242	1,159	1,242	1,159	12,948
PISTACHIOS TOT		45	132	45	132	906	178	409	178	409	2,961
OTHER NUTS		9,155	7,407	9,155	7,407	70,890	10,599	10,397	10,599	10,397	88,952
Subtotal:----		13,563	13,879	13,563	13,879	129,248	29,931	33,678	29,931	33,678	331,616
NURSERY PRODUCTS	NONE										
CARNATIONS		0	0	0	0	0	4,307	5,671	4,307	5,671	72,187
ROSES		0	0	0	0	0	5,361	7,179	5,361	7,179	71,908
OTHER CUT FLRS		0	0	0	0	0	13,493	12,659	13,493	12,659	157,931
OTH NURS PROD		0	0	0	0	0	18,367	15,535	18,367	15,535	115,677
Subtotal:----		0	0	0	0	0	41,530	41,046	41,530	41,046	417,704
HOPS & PRODUCTS	MT										
HOPS & PELLETS		44	179	44	179	4,936	70	584	70	584	21,165
OTHER HOP PRODS		0	28	0	28	676	0	98	0	98	3,614
Subtotal:----		44	207	44	207	5,612	70	683	70	683	24,780
WINE	KL										
GRAPE WINES		33,156	35,493	33,156	35,493	274,248	113,069	128,617	113,069	128,617	886,210
OTHER WN PROD		1,446	370	1,446	370	9,051	2,342	797	2,342	797	15,582
Subtotal:----		34,602	35,863	34,602	35,863	283,300	115,412	129,414	115,412	129,414	901,793
Grand Total:							492,516	504,232	492,516	504,232	6,043,997

General Developments

--The dates for the release of the Horticultural Products Review in 1990 are the following: January 17, February 14, March 14, April 11, May 16, June 13, July 11, August 8, September 19, October 17, November 14, and December 12.

--Argentina is attempting to develop non-traditional agricultural exports, including horticultural products. The World Bank and the Inter-American Development Bank are contributing $420 million towards this goal. In developing the Argentine fruit export sector, the project will attempt to follow the Chilean and Brazilian models. Table grapes and fruit juices are among the targeted products.

Currently, the rapidly deteriorating and increasingly unstable macroeconomic environment in Argentina has discouraged exports. For instance, export tax levels have been changed several times in the past year. As of this writing, the export tax on fresh table grapes is set at 12 percent, while those on dried fruit are set at 22 percent with a 2 percent reduction planned for each month through July 1990. In addition, a new 2 tier exchange rate further penalizes exporters.

Citrus and Products

--The Mexican citrus industry was damaged badly by freezing temperatures experienced in major growing areas during the last week in December 1989. The most serious crop damage occurred in the northern states of Nuveo Leon and Tamaulipas. Preliminary reports indicate that as much as 10 percent of this year's citrus crop, which had been estimated at 3.6 million tons, may have been lost. The orange harvest, accounting for more than 70 percent of Mexico's total citrus production, sustained the heaviest losses. Grapefruit and tangerine output was also negatively affected.

Efforts to salvage fruit will emphasize the diversion of oranges to processing plants. A general warming trend following the cold wave has accelerated fruit spoilage and is limiting the volume of fruit that can be saved for processing. Additionally, some juice plants were not scheduled to begin operating this season before mid-January and, therefore, were caught unprepared to deal quickly with the emergency. Although it is too early to accurately assess, temperatures did drop low enough to have caused significant tree damage. Production and utilization forecasts shown for the Mexican industry during 1989/90 in the accompanying world citrus tables in this publication are based on conditions prior to the freeze. In contrast, estimates for U.S. production, exports, and processing volumes in 1989/90 reflect post-freeze assessments.

--The Government of Japan has announced a 7,000 kiloliter additional import quota for "Single-Strength Orange Juice and Orange Juice Mixtures" for the second half of JFY 1989 (October 1989-March 1990). This brings the total allocation for these products to 21,000 kiloliters for JFY 1989, i.e., the quantity agreed upon under the Beef & Citrus Agreement of 1988. For quality reasons, the United States is supplying virtually all single-strength orange juice being imported by Japan.

--Japanese imports of fresh oranges reached 122,500 tons, an increase of approximately 3,300 tons over the prior year during marketing year 1988/89 (October 1988-September 1989). Nearly all Japanese orange imports are supplied by the United States. The growth, however, failed to keep pace with the annual increase in Japan's import quota called for in the U.S.-Japan citrus agreement signed in 1988. According to this agreement, all quantitative restrictions on imports of fresh oranges will be removed on April 1, 1991. During the interim period, the import quota is being raised 22,000 tons annually. For Japanese fiscal year 1989 (April 1989-March 1990), the quota was set at 170,000 tons. According to preliminary indications from the Japanese trade, as much as 20,000 tons of the quota may go unused. This represents the efforts of importers to manage fruit supplies so as to ensure that wholesale profit margins remain within the ranges that have become customary in recent years when supplies were more limited.

--Brazil has resumed issuing export licenses for frozen concentrated orange juice (FCOJ). The Foreign Trade Department of the Bank of Brazil, CACEX, decided to resume the issuance of export licenses for FCOJ on January 3. The issuance of export licenses had been stopped following the Christmas freeze in Florida and the resulting discrepancy between the minimum export price set by Brazil for FCOJ and rising international market price levels. Although the issuance of export licenses had been suspended, physical shipments were not interrupted. The exporter could have filed an export declaration at a price level which accurately reflected market conditions and loading of vessels would have gone on uninterrupted.

The minimum export price represents the minimum price which an exporter can record on his export declaration and therefore the minimum dollar value which must be turned over to the Brazilian government for conversion into local currency. On December 26, 1989, the minimum export price was increased to $1,120 per ton compared to a market price estimated at approximately $1,500. The minimum export price had been set based on a formula tied to quotations from the previous running 20 day average of New York orange juice future prices. This system therefore has a significant lag built into it for the minimum export price to catch up with a sudden and sharp swing in market prices as reflected by future contract price levels. In order to compensate for this price lag, the minimum export price, revised to $1,470 per ton, will be increased $10 daily until it reaches the absolute daily value of New York futures. Once reached, revisions in the minimum export price again will be made based on a running 20 day aver of New York orange juice futures prices.

Prior to the December freeze in Florida, Brazilian exports of FCOJ during marketing year 1989/90 (July-June) had been forecast at 790,000 tons at 65 degree brix (272.4 million gallons at 42 degree brix). Production of orange juice was forecast at 900,000 tons with an ending inventory level for June 30, 1989 of 114,000 tons (39.3 million gallons).

Fresh Non-Citrus

--Japan has increased its import quotas for apple juice concentrate. Japan had originally allocated an 8,000 ton import quota for apple juice concentrate (5:1 concentrate basis) for Japanese Fiscal Year 1989 (April 1989-March 1990). However, due to the increasingly strong consumer demand in recent years, and an insufficient supply of domestically-produced apple juice, the Japanese Government allocated an additional 5,000-ton quota in June 1989. On November 20, Japan announced yet a further additional import quota for 5,000 metric tons of apple juice concentrate, bringing the total allocation for JFY 1989 to 18,000 metric tons.

According to industry sources, the use of apple juice concentrate imported under these quotas has increased quickly, reflecting rapidly growing consumer demand. Under such circumstances, the Japanese industry once again requested that its Government issue the additional quota. In view of the approaching date of import liberalization of apple juice (April 1, 1990), together with grape and pineapple juices, this probably is the last allocation of the apple juice import quota by the Japanese Government.

Apple juice is being supplied from more than ten different countries including United States, West Germany, New Zealand and others. The current U.S. market share is about 20 percent compared with 40 percent for West Germany, the leading supplier.

--Japan has amended its plant quarantine regulations to allow entry of Sam, Lambert, and Rainier cherries and Firebrite nectarines from New Zealand. The announcement made December 20, 1989 was the result of a request from the New Zealand Government accompanied by the submission of research data. The New Zealand Government and fruit industry spent about three years on getting approval for these additional varieties. Japan had permitted, since August 1985, the entry of Dawson and Bing cherry varieties and Fantasia and Red Gold nectarines from New Zealand. Unfortunately, for the New Zealand cherry producers the amendments came right at the end of their season. Next year however, they anticipate a good market for the Rainier variety which is very similar to the Japanese Royal Ann variety.

Dried Fruits and Treenuts

--Current changes in the Hungarian economy have resulted in increased interest by exporters in the Hungarian nut market. Commercial production of treenuts is very small in Hungary. In recent years there has been an upward trend in the import of treenuts to meet the domestic demand. However, imports of shelled walnuts have declined over the last few years. Following table provides statistics on Hungarian imports from 1984 to 1988.

Table: Hungarian imports of Treenuts, 1984-88
(Metric Tons)

Commodity Name	1984	1985	1986	1987	1988
Almonds, Shelled	---	300	20	194	303
Walnuts, Shelled	1,403	1,282	995	807	608
Hazelnuts, Shelled	93	425	691	151	204
Chestnuts	231	791	1,884	663	2,046

Countries that offer most-favored-nation treatment to goods of Hungarian origin pay tariffs at the rate of 15 percent for shelled walnuts, 6.2 percent for Almonds, Hazelnuts and chestnuts, and 5 percent for shelled hazelnuts. All remaining countries except Eastern European countries, the Soviet Union, North Korea, China, Mongolia and Vietnam, face tariffs that are twice these rates. As the Hungarian importing becomes more market oriented, with increased promotion and trade servicing, U.S. almonds and walnuts could have an opportunity to expand shipments to this market.

Vegetables

--Due to the December freeze in Florida and Texas, Mexican vegetable producers are expected to divert vegetables from the domestic market to the United States. Industry sources in Mexico indicate that as much as 10 percent of domestic supply could instead be exported. However, growers are not expected to amplify planting schedules because U.S. producers can replant a large percentage of the vegetables that were lost.

--Cranberries are among the 27 items on which the U.S. and Canada have agreed to accelerate the reduction of tariffs to zero. The implementation of the zero duties is scheduled to take place on April 1, 1990, pending Congressional approval, rather than after the ten year period as originally agreed to under the Free Trade Agreement. The current Canadian duty for cranberries, HS# 0811.90.35, is 6 percent.

--Heavy torrential rains and gales in Spain in early November 1989 reportedly have resulted in the loss of 3,000 tons of Spain's avocado crop. The damage occurred in the Malaga region. Most of the losses are made up of the Hass variety which are generally exported to France and other EC countries. Granada, Spain's major avocado producing region, has not reported losses to the standing crop. In 1988/89, Spain's avocado production was unofficially estimated at about 20,000 tons.

Wine

--1989 Spanish wine production, estimated at about 28 million hectoliters (1.06 million gallons), continues trending downward. Although higher than last year, Spain's 1989 vintage, is 18 percent below the average production of the 6 preceding years. Wine consumption continues to decline, falling to an estimated 40.6 liters per capita in 1988, 6.4 liters less than in 1987. Strong competition from beer, increased consumption of quality wines at the expense of ordinary wines, and much higher prices for all types of domestic wines since accession to the EC are the major factors contributing to the decline.

Although the volume of wine imports into Spain decreased by 2 percent in 1988, the value increased by 21 percent to 2.8 billion pesetas. This was due to increased shipments from EC and U.S. suppliers along with a slump in cheap wine imports from Argentina and Chile. The recently increased domestic prices should create more marketing opportunities for imported speciality wines.

The volume of Spanish wine exports continues to decline, falling to an estimated 4.8 million hectoliters in 1988, compared to the nearly 6.7 million hectoliters record attained in 1985. However, the value of exports increased to a record 64 billion pesetas in 1988 due to higher prices and better quality exports.

--The Australian wine industry annually exports approximately 400,000 to 450,000 hectoliters, 10 percent of its annual production. Exports increased through 1988-89 and are expected to continue increasing through 1989-90. At the same time exports of wine to North America declined to an estimated 58,000 hectoliters in 1988/89 compared to 83,000 hectoliters in 1987/88. Higher prices resulting from cost increases and the strengthening Australian dollar are said to be behind the decline. The Australian Wine and Brandy Corporation expects the Australian dollar to fall over the next few months, removing the main obstacle to expansion in exports. The Corporation also is urging the wine industry to increase exports in the face of an anticipated record harvest in 1990.

--U.S. table wine sales in British Columbia, Canada increased 120 percent during fiscal year 1989 (10/1/88-9/30/89), despite only a 0.07 percent increase in overall wine sales in the province. An 8 percent decline in domestic wine sales made room for the 13 percent increase in imported wine sales. With sales of 2.34 million liters, U.S. wines shot past Italy, at 1.94 million liters, to secure second place amongst imports behind France at 4.59 million liters. U.S. beer sales in the province also grew but at a slower rate than in the previous year. U.S. brands led the imports with 11.4 million liters, followed by Mexican brands at 1.4 million liters.

MONTHLY EXCHANGE RATES FOR SELECTED FOREIGN CURRENCIES
January 12, 1990

(Foreign Currency Units Per U.S. Dollar)

Currencies	1/12/90 Current Rate	12/12/89 Month Ago Rate	12/89 Year Ago Avg.	12/88 Two Year Ago Avg.
Canadian Dollar	1.1560	1.1630	1.1610	1.1960
ECU 1/	0.8271	0.8603	0.8565	0.8446
British Pound	0.6027	0.6215	0.6258	0.5479
French Franc	5.7130	5.9250	5.9312	5.9978
West German Mark	1.6775	1.7340	1.7357	1.7564
Japanese Yen	145.6000	144.1500	143.6600	123.6100
South Korean Won	673.1100	666.2700	671.1130	685.4570
New Taiwan Dollar	25.8700	25.5000	25.9440	28.1500
Singapore Dollar	1.8925	1.9205	1.9173	1.9437
Hong Kong Dollar	7.8085	7.8090	7.8093	7.8059

1/ European Currency Unit. A weighted basket of the currencies of the 12 EC member states.

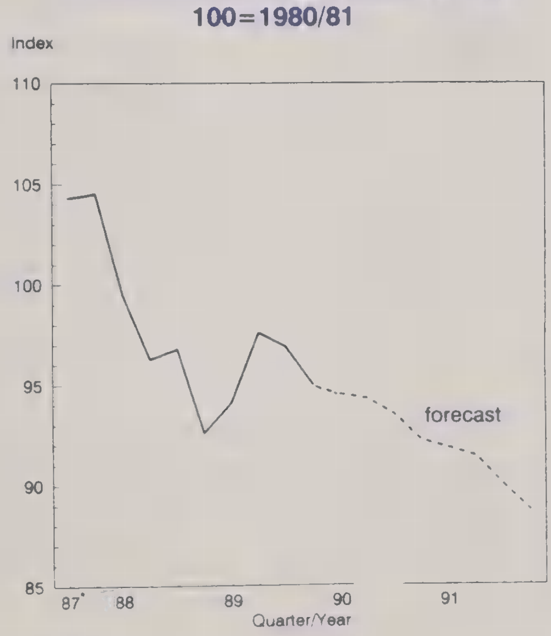
Exchange rates are spot as of 3 p.m. Eastern Time, January 12, 1990.
Source: FAS/TEID Exchange Rate Database and Wall Street Journal.

General Developments and Outlook

The value of U.S. horticultural exports (not including the miscellaneous category) to offshore markets reached $2.89 billion in fiscal year 1989 (October 1988-September 1989).[1] This broke the previous year's record by 6 percent, but was below expectations for 1989 horticultural export performance. Exports showed irregular growth in different regions. U.S. horticultural exports to Japan, the largest single offshore market, rose 8 percent in 1989, while exports to Western Europe contracted 4 percent. Exports to the rapidly expanding markets in East Asia and Oceania (other than Japan), shot up 27 percent.

While U.S. exports rose, the rate of export growth flattened out in 1989, dropping from the previous two years' double-digit rate. A further slowing of U.S. horticultural exports is likely in FY 1990. Exports of horticultural products are forecast to reach $ 2.9 billion in 1990, barely changed from the 1989 figure. Much of this apparent lack of growth is due to a forecast decline in fresh fruit exports. This in turn is due to an anticipated drop in citrus exports that could more than offset expected robust growth in the fresh non-citrus categories. A further contributing factor is the expected decline in tree nut exports.

INDEX OF U.S. EXCHANGE RATES
100=1980/81



* 1987 [illegible] are for third and fourth quarters only
Based on the top 40 U S trading partners
SOURCE Wharton Econometric Forecasting Associates

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[1]Offshore exports cover all exports except those to Canada. The exclusion of Canada, our single most important horticultural market, is due to inaccurate data stemming from undercounting of U.S. exports to that country. All statistics and forecasts in this article are on a fiscal year basis unless otherwise stated. Exports of products in the Miscellaneous category, which include products such as beer, yeast, and potato chips, totaled $389 million in fiscal year 1989, up 25 percent from the previous year.

The slowing of export expansion in 1989 may have been a lagged effect of the earlier leveling off of exchange rates which followed the freefall of the U.S. dollar in 1986 and 1987. The modest recovery in the value of the dollar in recent months has not yet had a major impact on export growth, but could in the current fiscal year. Over the longer term, however, the Wharton Econometric Forecasting Association (WEFA) foresees a falling dollar in the coming years, which could boost overseas demand for price-elastic U.S. horticultural products.

Continued steady growth in the global economy is likely, according to WEFA, suggesting an increasing market for income-elastic U.S. horticultural products. WEFA forecasts average annual world income growth through 1994 at a healthy 3.5 percent. This expansion will be led by Asia's Newly Industrialized Economies, which include South Korea, Hong Kong, Singapore, and Taiwan, where annual GDP growth is predicted to average 6.6 percent over the next five years. Developing Countries, taken as a group, are forecast to experience annual growth averaging 4.7 percent, well above the level of growth in the Industrialized Economies. The general economic outlook for the Developing Countries is clouded, however, by persistent debt problems.

The forecast rapid economic expansion of the Newly Industrialized Economies augurs well for continued U.S. export growth in East Asia, especially to the degree that market access in these countries improves. In the potentially huge growth market of Korea, bilateral negotiations with the United States have resulted in the reduction of some market access barriers. However, serious new marketing problems have developed in Korea due, in part, to a widespread mistrust of imported foodstuffs.

A degree of uncertainty in predicting market growth is created by the economic changes occurring in Eastern Europe. It is generally expected that Eastern European plans for allowing market forces greater reign in the local economies will, in the long-term, lead to higher incomes and an increase in trade. Many East European governments, including the Soviet Union, have made commitments to their citizens to improve the quantity, quality, and diversity of consumer goods. For instance, the U.S. Agricultural Attache in East Berlin reports that political changes in East Germany are expected to lead to a sharp increase in imports of fresh and processed fruits and vegetables.

Tapping pent-up East European demand for produce could be constrained in the short-term, however, by the grave economic dislocation that market reform may entail. Streamlining the East's inefficient and archaic economic structures could lead to temporary widespread unemployment and economic hardship. From a short term per-capita income and foreign exchange earnings point of view, this would suggest a curtailment of effective demand for high value food products, due to temporary severe declines in purchasing power.

Some of the export success U.S. horticulture has enjoyed in recent years can be attributed to the United States Department of Agriculture's Targeted Export Assistance Program (TEA). This five-year program has devoted substantial resources of the Commodity Credit Corporation to market development and consumer promotion programs throughout the world. Of the $200 million allocated in 1989, about 40 percent was targeted at expanding markets for U.S. horticultural products. TEA allocations for 1990 again has been set at $200 million with $87 million reserved for horticultural products. The legislation establishing TEA will expire after 1990. It is not known whether or not the next farm bill will contain a similar provision.

A final factor in the rise in U.S. horticultural exports that should continue in the coming year is the trend toward market liberalization. While some new trade barriers appear every year, the elimination of such barriers has been a more common phenomenon in the recent past. There is every indication that offshore markets will continue to become more open to international trade, albeit at a moderate pace.

Outlook by Commodity Group

Citrus: Offshore sales of fresh citrus during 1990 are forecast at $370 million, down 23 percent from last year. The reduction in export value is tied to a restriction in supplies of export-grade fruit resulting from the freeze in Florida and Texas during Christmas week. Export shipments of fresh grapefruit will be hurt the most, although sales of tangerines and oranges also will suffer. Somewhat offsetting the poor outlook for the Florida and Texas citrus industries is the likelihood that the 1989/90 California navel crop will be significantly larger than last season, with an improved size distribution, and excellent quality.

Exports of fresh grapefruit in 1990 are forecast at 180,000 tons compared to 454,000 tons in 1989. The Japanese market normally takes 50 to 55 percent of all offshore grapefruit exports with the vast majority of this fruit being white-fleshed and grown in Florida. Florida shippers simply will not have the required volume of high-quality grapefruit demanded by Japanese, as well as European importers, during the current season.

Orange exports to offshore destinations in 1990 are forecast to increase nearly 10 percent over last year to approximately 300,000 tons. Export sales in the important Asian markets of Japan, Hong Kong, and Singapore will benefit from the tendency in this season's California navel crop to favor the larger sizes which generally are preferred in these markets. Japan's annual orange import quota continues to expand in line with the U.S.-Japan Citrus Agreement reached in 1988 and will be increased from 170,000 tons to 192,000 tons in April 1990. Japan's import duty, however, was not adjusted by the Agreement. The import duty is fixed at 40 percent ad valorem during December-May and 20 percent for June-November.

Approximately 90 percent of all offshore lemon exports are shipped to Japan. Although the U.S. lemon crop will be slightly smaller this year, supplies of export-grade fruit will be adequate and a modest increase of about 3 percent in movement to 135,000 tons is anticipated. Export volume for tangerines in 1990 is likely to drop due to crop losses associated with the December freeze.

Export earning from offshore shipments of citrus juice in 1990 are not expected to reach the record $148 million set in 1989. Although orange juice export volume will decline in response to this year's smaller production in Florida, strengthening juice price levels will soften the decline in total export value. A heavy U.S. inventory position in grapefruit juice should allow the United States to be competitive in offshore markets.

Fresh Non-Citrus Fruit: U.S. apple exports in 1990 are forecast to jump some 33 percent over the previous year, due to increased U.S. exportable supply, in combination with reduced production in the European Community and strengthened demand in Asia. A drop in the price of U.S. apples, due to a large crop in the Pacific Northwest, has offset much of the demand depressing effect of the strengthened U.S. dollar.

In the Nordic countries, U.S. apple exports were constrained, during the beginning of the 1990 fiscal year, due to record domestic production in Sweden, Norway, and Finland. This initial problem has been less severe in Sweden, as that country has opened its import season one month earlier than in the previous year. In East Asia and the Middle East, the market for U.S. apples is expected to continue its impressive income-driven growth, after suffering a setback last year, due to the Alar controversy.

A 30 percent increase in U.S. pear exports is expected in 1990, because of a poor pear crop in Europe, at a time of increased U.S. supply. A contributing factor has been the success of the aggressive marketing effort of the U.S. pear industry under the TEA program. U.S. grape exports are forecast to grow 27 percent, driven by a strong U.S. crop last season and rising demand in East Asia, the United Kingdom, and the Nordic Countries.

U.S. offshore exports of avocados in 1990 are forecast to reach about $8.0 million, slightly below the level of 1989 and down 53 percent from 1988. This year's exports will be down mainly because of another short U.S. crop caused by unfavorable weather conditions. In 1989, exports to France and Japan, the major U.S. markets, plunged to less than $1 million and to $1.7 million respectively from $5.5 million and $5.3 million in 1988. Shipments to other key European markets--the Netherlands, Belgium and Sweden--during the same period, registered declines ranging from 40 to 55 percent.

Offshore kiwifruit shipments for 1990 are forecast to total about $12.0 million, up 47 percent from the previous year, despite disappointing prospects in Japan and Europe. Most of the growth, driven in part by promotion under the TEA program, should occur in the Far East markets of Korea, Taiwan, Hong Kong, and Singapore. U.S. shipments to the EC, a traditional market place for U.S. fruit, are not expected to increase as long as low price fruit is being produced and sold within the EC. EC producers include Italy, France, Greece, Spain, and Portugal. Japan, a once traditional market for U.S. kiwifruit, apparently has been lost to cheaper Italian fruit and expanding domestic output. In 1989, U.S. exports to Japan totaled only $950,000, compared to $7.1 million in 1988. According to a working group paper published by the Organization For Economic Cooperation and Development (OECD), Italy has become one of the world's largest producers of kiwifruit, with production forecast to reach over 200,000 tons in 1990, about the same level that OECD is forecasting for New Zealand.

Offshore papaya shipments for 1990 are forecast to total about $12 million, up 20 percent from the previous year. Approximately 98 percent of offshore shipments go to Japan.

Offshore exports of frozen strawberries for 1990 are forecast to reach about $10 million, up 13 percent from 1989. Most of the increase is expected to occur in shipments to Japan, which account for over 80 percent of U.S. offshore exports. U.S. offshore exports of frozen blueberries for 1990 are forecast to total approximately $4 million, up slightly from the previous year. About 80 of offshore shipments go to West Germany, Japan and the Netherlands. Offshore shipments of other frozen fruit for 1990 are forecast to reach about $10 million, about the same as the previous year. In 1989, most of the growth occurred in Hong Kong and Japan.

Canned Fruit: 1989 U.S. offshore exports of canned and prepared fruit increased in both quantity and value from 1988, with much of the increase coming from canned citrus products and fruit jams and jellies.

Offshore canned and prepared fruit exports are expected to decline in 1990, due to a smaller peach pack and by the partial recovery of the U.S. dollar against the yen, which increases prices in the Japanese market. Domestic demand for canned fruit is also expected to rise, further slowing exports. The decline in exports should be partially offset by a slight increase in canned fruit mixtures and canned pear exports.

Dried Fruit: After steady increases over the previous four years, U.S. offshore exports of raisins were stagnant in 1989. U.S. exports are forecast to increase only slightly, from 95,000 tons to 98,000 tons in 1990. The world supply of raisins for 1990 is estimated to meet world demand. U.S. production increased 6 percent this year, while production in other major producing Northern Hemisphere countries declined. World stocks have recovered from the low levels of 1987/88, and are expected to stay at 1988/89 level. Although output in Greece and Turkey are down, they are producing above their average of the past few years. Both countries, able to offer very attractive prices, are expected to focus their export sales program towards the EC market. Even with increased production, U.S. exports to the EC and the rest of Western Europe are expected to increase only minimally in 1990.

Shipments to Asia are expected to rise slightly from 31,500 tons to about 33,000 tons, due to increased sales to Japan. Higher prices of U.S. raisins may increase the value of exports. In 1989, U.S. exports to Japan declined in value from 1987 by $600,000. Exports to Korea are expected to decline, while deliveries to Singapore and Taiwan should remain stagnant, with increased competition for these markets from Southern Hemisphere suppliers. Sales to the Middle East declined 30 percent in volume and 35 percent in value in 1989 over 1988, and are expected to remain at the same level for 1990.

U.S. exports of dried prunes were down 3 percent in 1989 to 54,000 tons valued at $88 million. Increased U.S. production in 1989/90, combined with lower French production should cause increased exports, particularly to Europe.

Vegetables: Over 80 percent of fresh vegetable exports are bound for Canada. Nevertheless, offshore shipments are an important part of the overall vegetable export picture. Exports increased to $121 million in 1989, a 16 percent rise over 1988. The primary fresh vegetables exported in 1989 were (in descending order of export value) asparagus, onions, lettuce, celery, and garlic. These five products accounted for 52 percent of export value in 1989. Fresh vegetable shipments are forecast to climb slightly in 1990 to $123 million.

Asparagus exports rose marginally in 1989 to $27 million. This slow growth is forecast to continue into 1990, with exports reaching $28 million. Exports to Japan increased 8 percent in 1989 to $20 million. The EC market, however, slipped 20 percent in volume from 1988 to 1989. Onion shipments dropped 18 percent to $14 million in 1989. A late surge in 1988 exports compared to late sluggishness in 1989 accounted for the drop. Almost 65 percent of shipments went to Japan in 1989, with the rest of East Asia taking another 19 percent. Despite plentiful U.S. supplies, onion exports will drop again in 1989, as Japan's domestic onion crop was excellent, thus softening import demand. However, shipments to other East Asian markets will continue strong. Export value is forecast at $10 million, on movement of 40,000 tons. Hong Kong was the dominant market for lettuce and celery shipments in 1989 and should continue as such into 1990. Exports in 1990 are predicted to rise to $13 million and $6.5 million, 8 and 3 percent, respectively. U.S. garlic found a ready market in Australia, where exports more than doubled in 1989, to $2.7 million. Prospects for 1990 are excellent, with exports forecast to reach $6 million, a 20 percent increase.

Canned vegetable product exports increased a wopping 58 percent to $208 million in 1989. This increase is thought to be skewed higher due to changes in groupings and classifications coming out of the switch to the Harmonized Tariff System in 1989. Nevertheless, exports are forecast to rise 6 percent to $220 million in 1990. Canned corn is the primary component in processed vegetable exports, accounting for 47 percent of value in 1989. Most canned corn traditionally goes to East Asia and the EC. Exports of canned corn fell in 1989 primarily due to a drought-reduced 1988 pack and subsequent high prices. The 1989 pack was superior and supplies should be adequate for both foreign and domestic buyers. Shipments in October 1989, the first month of FY1990, were up 21 percent over the same month the previous year, a fine harbinger for the coming year. Exports are forecast to surpass their 1988 level, reaching $83 million in 1990.

Frozen vegetable exports have climbed steadily through the latter half of the 1980's, driven mainly by frozen potato products and frozen corn. This trend is expected to persist into the 1990's, with Japan and East Asia continuing to take the majority of exports. In 1989 frozen vegetable exports grew to $193 million, an 18 percent increase over 1988. Export growth in 1990 is forecast to slow somewhat, to $211 million. Offshore movement was not affected as much by the 1988 drought as other products, as production of the predominant products--sweet corn and potatoes--is centered in the Pacific Northwest which enjoyed a banner 1988 season. Packs for these products were good in 1989, however November stocks of frozen French fries are down from the same time period in 1988.

Shipments of frozen sweet corn reached $40 million in 1989, up 14 percent over 1988. Export growth in 1990 is predicted to continue strong, rising to $45 million. Movement of frozen French fries reached $92 million, up 19 percent over 1988. Japan took almost 80 percent of French fry shipments in 1989. Although Japan will remain the dominant market for U.S. exports, preliminary figures indicate a flattening in that market. However, other East Asia markets, particularly Hong Kong, Singapore, and Malaysia, should continue to grow. Overall frozen French fry exports are forecast up 9 percent to $100 million on shipments of 153,000 tons. Other frozen potato product shipments jumped 27 percent in value in 1989. Export growth is forecast to flatten somewhat in 1990, reaching $16 million.

Tree Nuts: The United States exported 239,503 tons of nuts valued at $663 million to overseas market during 1988/89. Original forecast of $900 million in treenut exports was not met due to drop in total production and simultaneous increase in domestic consumption of almonds, walnuts and pistachios.

Total production of treenuts for 1989/90 year is being estimated better than originally projected. Total production of almonds is estimated at over 204,000 tons while walnut production for this year has reached 210,000 tons. Although 1989/90 is the "off" year in the bearing cycle for pistachios production is estimated at 18,000 tons compared with the original forecast of only 12,700 tons. In spite of aggressive marketing using TEA funds and better marketing opportunities resulting from relaxed restriction in some of the Pacific Rim and EC countries total exports of nuts are forecast to reach $640 million in 1989/90.

U.S. almonds remained the leading crop among treenut exports in 1988/89. The United States exported over $505 million in almonds during last year. Due to a relatively smaller crop and higher prices coupled with a bumper crop in Spain total exports of almonds are expected to be lower than last year's level. Major markets for almonds are still expected to the Pacific Rim and the EC countries.

Walnut crop in 1989/90 is estimated to be approximately 12 percent higher than the previous year and 10 percent higher than the original forecast for this year. Good quality of this year's crop combined with favorable market conditions in West Germany, Spain, and Italy are forecast to result in greater than expected increases in shipments to these countries. Total exports of inshell walnuts are forecast to increase to $80 million compared with $72 million during 1988/89.

Wine: The U.S. wine industry is looking for an approximately 13 percent increase in total wine exports during the year 1989/90 over the previous year's level of $75 million. Major markets are expected to be Japan and the United Kingdom. Aggressive marketing under the TEA program and import tariff reductions in some countries are contributing towards improved U.S. wine exports. Exports are also expected to grow in the Scandinavian and other North European markets. U.S. wine producers are finding it harder to increase domestic shipments. Therefore, they are aggressively looking for overseas markets for their products.

U.S. EXPORTS OF HORTICULTURAL PRODUCTS TO OFFSHORE DESTINATIONS[1]
Fiscal Years (Oct-Sept), Millions of Dollars

COMMODITY GROUP	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90[2]
Fresh Fruit	523	593	713	798	841	817
Processed Fruit	335	351	427	536	588	604
Fresh Vegetables	59	66	78	104	121	123
Processed Vegetables	237	260	297	371	487[3]	516
Tree Nuts	480	465	560	748	663	640
Wine	20	25	43	71	75	85
Hops and Products	44	45	48	54	64	60
Nursery Products	36	43	42	53	51	60
TOTAL	1,735	1,847	2,209	2,735	2,891	2,904

[1]Offshore refers to all countries except Canada. [2]Forecast. [3]Part of increase due to changes in definition of category.

U.S. EXPORTS OF SELECTED HORTICULTURAL PRODUCTS TO OFFSHORE DESTINATIONS 1/
Fiscal Years (Oct-Sept) 1988-89 and Forecast 1990

COMMODITY	1987	1988	1989	1987	1988	1989
	---1,000 Metric Tons---			---- $ Million ----		
Oranges	239	275	300	138	160	175
Grapefruit	425	454	180	208	220	95
Lemons	133	131	135	94	92	95
Apples	249	204	280	108	102	137
Raisins	91	91	93	137	137	158
Dried Prunes	56	54	57	90	88	97
Asparagus	9	9	10	26	27	28
Onions	62	49	40	17	14	10
Canned Corn	108	98	110	81	79	83
Frozen Corn	47	52	58	35	40	45
Frozen French Fries	114	141	163	77	92	100
Almonds, Shlld/Prepd	179	150	125	573	474	410
Walnuts, Inshell	47	46	50	86	72	80
Wine (million liters)	49	59	65	71	75	85

1/ All destinations except Canada.

Citrus production in the principal producing countries of the Mediterranean Basin during the 1989/90 season is forecast at 13.9 million tons, about 2 percent below a year earlier. Overall export volume of fresh citrus handled by Mediterranean shippers will decline modestly in line with the drop in exportable supplies. Utilization of citrus fruit by processors in the region, however, is expected to be off sharply.

The drop in citrus production in 1989/90 by Mediterranean growers largely reflects the smaller crops projected in Italy, Morocco and Turkey. The Italian industry continues to suffer from the affects of the freeze of 1987. Production also was hampered from hot and dry weather this past spring and summer. Turkish orange and lemon production is down because of a severe drought and last winter's freeze which badly damaged many lemon trees and and the fruit set for this season. In Morocco, citrus production appears to be off following the record production of 1988/89 and concern over the export outlook which may have resulted in a reduction in grove inputs.

The Spanish citrus industry had forecast a record citrus harvest in 1989/90 of 4.8 million tons compared to the previous record of 4.5 million tons set two years ago. Unfortunately, several weeks of persistent heavy precipitation in the important producing areas of Valencia and Castellon caused the loss of as much as 400,000 tons of tangerines. Orange and lemon harvests reportedly sustained only minor losses due to the November-December rains. The Spanish citrus crop nevertheless will be larger than the prior season.

A return to normal weather and improved water supplies for irrigation is expected to allow Egypt's citrus production in 1989/90 to recover from the poor showing in 1988/89. Almost all of the increase in citrus supplies will be directed to internal fresh orange consumption. Citrus fruit availability in Israel and Greece also will be up this season. The additional fruit produced in Israel will be directed to export markets while the increase in the Greek harvest will be absorbed by processors.

Fresh citrus exports by Mediterranean shippers during the 1989/90 season is forecast at at 4.6 million tons, down less than 1 percent from a year earlier. The larger export volume anticipated for Israel and Spain will be offset by declines for Morocco and Turkey. Export sales by most other Mediterranean countries in 1989/90 will reach volumes similar to 1988/89.

Although total fresh citrus exports will be off slightly in 1989/90 from the 1988/89 season, export shipments of fresh oranges by Mediterranean Basin producers in 1989/90 are expected to be up 8 percent. This is based on an improved fruit availability in the region and increased sales this season by Israel and Spain. The lion's share of the additional orange exports projected for Spain and Israel will be taken by West European importers and will not compete with U.S. orange sales made in our key Asian markets. Mediterranean exports of fresh grapefruit in 1989/90 also will reach larger levels than a year ago. This is due to the larger Israeli crop and the strong European import demand for Israeli grapefruit that is anticipated because of the sharp reduction in Florida grapefruit supplies resulting from the December freeze.

The overall reduction in Mediterranean fresh citrus exports is tied to smaller shipping volumes for tangerines and lemons. Turkey's smaller lemon harvest and a strong internal demand which has caused nearly a doubling in domestic price levels are expected to cause Turkey's lemon exports to plummet from 125,000 tons in 1988/89 to 50,000 tons in 1989/90. The Soviet Union is the largest buyer of Turkish lemons, with other important export outlets in Eastern Europe and the Middle East. The European Community recently designated 15,000 tons of lemons to be part of its food aid package for Poland. This fruit will be supplied from lemons withdrawn from commercial channels under the European Market's market support mechanism. The reduction in the 1989/90 tangerine crops in Spain, Morocco, and Turkey will limit the region's export shipments of tangerines.

Utilization of citrus fruit by Mediterranean processors in 1989/90 will decline to 2.5 million tons, 13 percent below 1988/89. Processed fruit volumes are expected to drop sharply in Italy, Morocco, Spain, and Turkey. Although Mediterranean processors are likely to absorb less of all major citrus fruit types in the current season, the reduction in oranges and lemons will be the most pronounced.

FRESH CITRUS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1987/88 TO 1989/90 1/
(1,000 METRIC TONS)

TABLE 1: TOTAL CITRUS	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
COUNTRY	1987/88	1988/89	FORECAST: 1989/90	1987/88	1988/89	FORECAST: 1989/90	1987/88	1988/89	FORECAST 1989/90
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus	286	305	325	199	195	229	40	75	61
Egypt	1,661	1,544	1,759	214	178	180	14	16	17
Gaza	105	124	134	99	113	123	—	—	—
Greece	608	1,019	1,087	188	253	252	93	160	187
Israel	1,127	1,042	1,200	467	347	476	557	670	673
Italy	2,313	3,081	2,737	233	237	231	512	1,083	866
Morocco	1,234	1,451	1,150	544	643	538	254	336	244
Spain	4,543	4,246	4,422	2,373	2,299	2,395	398	388	347
Turkey	1,252	1,335	1,051	234	309	137	127	140	106
Subtotal	13,129	14,147	13,865	4,551	4,574	4,561	2,003	2,868	2,501
OTHER NORTHERN HEMISPHERE									
Cuba	944	990	1,015	450	508	558	165	185	210
Japan	3,298	2,674	2,774	23	22	23	866	539	652
Mexico 1/	2,879	3,190	3,639	53	64	54	605	529	717
United States 1/ 2/	11,577	11,975	8,886	955	999	738	7,777	8,169	5,732
Subtotal	18,698	18,829	16,314	1,481	1,593	1,373	9,413	9,422	7,311
Total Northern Hemisphere	31,827	32,976	30,179	6,032	6,167	5,934	11,416	12,290	9,812
SOUTHERN HEMISPHERE									
Argentina	1,612	1,395	—	181	184	—	473	448	—
Australia	550	623	—	50	61	—	306	337	—
Brazil	11,424	14,455	—	86	92	—	7,477	10,175	—
Chile	200	190	—	1	2	—	—	—	—
South Africa 3/	876	800	—	435	440	—	304	217	—
Uruguay	165	173	—	55	65	—	40	44	—
Total Southern Hemisphere	14,827	17,636	—	808	844	—	8,600	11,221	—
GRAND TOTAL	46,654	50,612	30,179	6,840	7,011	5,934	20,016	23,511	9,812

—Indicates zero, negligible, or not available.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

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Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USD

FRESH CITRUS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1987/88 TO 1989/90 4/
(1,000 METRIC TONS)

TABLE 2: SWEET ORANGES	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
COUNTRY	1987/88	1988/89	1989/90F	1987/88	1988/89	1989/90F	1987/88	1988/89	1989/90F
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus	138	153	165	97	[illegible]	113	20	49	32
Egypt	1,387	1,199	1,390	214	178	180	[illegible]	10	10
Gaza 5/	[illegible]	98	112	[illegible]	91	105	—	—	—
Greece	462	770	831	181	221	220	79	124	150
Israel	627	546	630	300	205	275	289	351	340
Italy	1,343	1,968	1,655	150	153	150	305	800	600
Morocco 6/	891	994	844	408	455	400	227	289	220
Spain	2,442	2,216	2,634	1,179	998	1,200	160	165	180
Turkey	700	700	600	66	90	30	70	75	60
Subtotal	8,073	8,644	8,861	2,675	2,475	2,673	1,158	1,863	1,592
OTHER NORTHERN HEMISPHERE									
Cuba	560	575	590	265	300	330	115	125	140
Japan	67	58	60	—	—	—	2	2	2
Mexico 1/	1,942	2,269	2,650	9	8	2	400	344	530
United States 1/ 7/	7,903	8,269	6,087	335	367	400	5,958	6,385	4,400
Subtotal	10,472	11,171	9,387	609	675	732	6,475	6,856	5,072
Total Northern Hemisphere	18,545	19,815	18,248	3,284	3,150	3,405	7,633	8,719	6,664
SOUTHERN HEMISPHERE									
Argentina	650	600	—	75	[illegible]	—	170	165	—
Australia	450	504	—	45	53	—	265	290	—
Brazil	10,400	13,385	—	79	85	—	7,385	10,080	—
Chile	120	100	—	—	—	—	—	—	—
South Africa 6/ 8/	682	632	—	350	355	—	217	156	—
Uruguay	68	71	—	37	38	—	13	15	—
Total Southern Hemisphere	12,370	15,292	—	586	611	—	8,050	10,706	—
GRAND TOTAL	30,915	35,107	18,248	3,870	3,761	3,405	15,683	19,425	6,664

TABLE 3: TANGERINES	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
COUNTRY	1987/88	1988/89	1989/90F	1987/88	1988/89	1989/90F	1987/88	1988/89	1989/90F
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus	6	6	6	2	3	3	—	—	—
Egypt	134	151	155	—	—	—	4	4	5
Gaza 5/	—	—	—	—	—	—	—	—	—
Greece	49	69	73	1	1	2	1	1	2
Israel	122	90	120	32	30	40	50	35	55
Italy	333	407	400	[illegible]	4	4	15	13	15
Morocco 9/	303	420	271	133	184	134	22	45	20
Spain	1,307	1,260	1,052	773	876	760	155	150	90
Turkey	280	320	250	53	74	40	28	32	25
Subtotal	2,534	2,723	2,327	1,002	1,172	983	275	280	212
OTHER NORTHERN HEMISPHERE									
Cuba	25	30	30	5	[illegible]	[illegible]	—	—	—
Japan 10/	2,941	2,387	2,477	23	22	23	830	508	620
Mexico 1/	151	157	180	9	14	12	15	16	18
United States 1/ 11/	369	372	277	15	11	5	173	178	[illegible]
Subtotal	3,486	2,946	2,964	52	55	48	1,018	702	718
Total Northern Hemisphere	6,020	5,669	5,291	1,054	1,227	1,031	1,293	982	930
SOUTHERN HEMISPHERE									
Argentina	286	280	—	16	27	—	16	24	—
Australia	32	41	—	3	5	—	5	6	—
Brazil 12/	453	467	—	5	5	—	—	—	—
Chile	—	—	—	—	—	—	—	—	—
South Africa 2/	—	—	—	—	—	—	—	—	—
Uruguay	35	37	—	6	7	—	3	3	—
Total Southern Hemisphere	806	825	—	30	44	—	24	33	—
GRAND TOTAL	6,826	6,494	5,291	1,084	1,271	1,031	1,317	1,015	930

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Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

FRESH CITRUS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1987/88 TO 1989/90 4/
(1,000 METRIC TONS)

TABLE 4: LEMONS COUNTRY	PRODUCTION 1987/88	 1988/89	 1989/90F	EXPORTS OF FRESH FRUIT 1987/88	 1988/89	 1989/90F	FRUIT PROCESSED 1987/88	 1988/89	 1989/90F
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus	46	49	49	30	36	37	6	7	6
Egypt	2	2	2	—	—	—	—	—	—
Gaza	12	13	10	10	11	8	—	—	—
Greece	89	170	173	6	31	30	8	30	30
Israel	47	37	40	16	8	12	18	26	24
Italy	592	681	650	74	77	75	150	252	225
Morocco	20	21	20	1	1	1	2	—	2
Spain	760	733	700	410	415	425	70	60	65
Turkey	240	280	170	100	125	50	24	28	17
Subtotal	1,808	1,986	1,814	647	704	638	278	403	369
OTHER NORTHERN HEMISPHERE									
Cuba	—	—	—	—	—	—	—	—	—
Japan	2	2	2	—	—	—	—	—	—
Mexico 1/	9	9	9	—	—	—	9	9	9
United States 1/	712	689	672	139	140	140	296	266	260
Subtotal	723	700	683	139	140	140	305	275	269
Total Northern Hemisphere	2,531	2,686	2,497	786	844	778	583	678	638
SOUTHERN HEMISPHERE									
Argentina	500	360	—	57	49	—	196	168	—
Australia 13/	37	43	—	1	2	—	19	21	—
Brazil 14/	35	35	—	—	—	—	35	35	—
Chile	60	90	—	1	2	—	—	—	—
South Africa	65	52	—	22	22	—	32	20	—
Uruguay	54	57	—	10	18	—	20	22	—
Total Southern Hemisphere	771	637	—	91	93	—	302	266	—
GRAND TOTAL	3,302	3,323	2,497	877	937	778	885	944	638

TABLE 5: GRAPEFRUIT COUNTRY	PRODUCTION 1987/88	 1988/89	 1989/90F	EXPORTS OF FRESH FRUIT 1987/88	 1988/89	 1989/90F	FRUIT PROCESSED 1987/88	 1988/89	 1989/90F
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus	96	97	105	70	72	76	22	19	23
Egypt	—	2	2	—	—	—	—	—	—
Gaza	10	13	12	9	11	10	—	—	—
Greece	5	6	6	—	—	—	3	3	3
Israel	317	353	390	114	98	140	193	255	250
Italy	3	7	6	1	3	2	—	—	—
Morocco	4	4	4	—	—	—	2	2	2
Spain	18	22	23	7	6	7	3	3	3
Turkey	27	30	27	15	20	17	3	3	3
Subtotal	480	534	575	216	210	252	226	285	284
OTHER NORTHERN HEMISPHERE									
Cuba	284	315	325	160	180	200	50	60	70
Japan	—	—	—	—	—	—	—	—	—
Mexico 1/	105	75	100	5	—	—	51	30	30
United States 1/	2,541	2,595	1,800	462	478	190	1,333	1,328	980
Subtotal	2,930	2,985	2,225	627	658	390	1,434	1,418	1,080
Total Northern Hemisphere	3,410	3,519	2,800	843	868	642	1,660	1,703	1,364
SOUTHERN HEMISPHERE									
Argentina	176	155	—	33	28	—	91	91	—
Australia	31	35	—	1	1	—	17	20	—
Brazil	24	24	—	—	—	—	22	22	—
Chile	—	—	—	—	—	—	—	—	—
South Africa 8/	129	116	—	63	63	—	55	41	—
Uruguay	8	8	—	2	2	—	4	4	—
Total Southern Hemisphere	368	338	—	99	94	—	189	178	—
GRAND TOTAL	3,778	3,857	2,800	942	962	642	1,849	1,881	1,364

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Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

FRESH CITRUS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1987/88 TO 1989/90 4/
(1,000 METRIC TONS)

TABLE 6: OTHER CITRUS 4/ COUNTRY	PRODUCTION 1987/88	PRODUCTION 1988/89	PRODUCTION FORECAST: 1989/90	EXPORTS OF FRESH FRUIT 1987/88	EXPORTS OF FRESH FRUIT 1988/89	EXPORTS OF FRESH FRUIT FORECAST: 1989/90	FRUIT PROCESSED 1987/88	FRUIT PROCESSED 1988/89	FRUIT PROCESSED FORECAST 1989/90
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus	—	—	—	—	—	—	—	—	—
Egypt 15/	138	190	210	—	—	—	2	2	2
Gaza	—	—	—	—	—	—	—	—	—
Greece 16/	3	4	4	—	—	—	2	2	2
Israel	14	16	20	5	6	9	7	3	4
Italy 17/	42	18	26	—	—	—	42	18	26
Morocco	16	12	11	2	3	3	1	—	—
Spain 18/	16	15	13	4	4	3	10	10	9
Turkey 18/	5	5	4	—	—	—	2	2	1
Subtotal	234	260	288	11	13	15	66	37	44
OTHER NORTHERN HEMISPHERE									
Cuba 15/	75	70	70	20	20	20	—	—	—
Japan 19/	288	227	235	—	—	—	34	29	30
Mexico 1/ 20/	672	680	700	30	42	40	130	130	130
United States 1/ 20/	52	50	50	4	3	3	17	12	12
Subtotal	1,087	1,027	1,055	54	65	63	181	171	172
Total Northern Hemisphere	1,321	1,287	1,343	65	78	78	247	208	216
SOUTHERN HEMISPHERE									
Argentina	—	—	—	—	—	—	—	—	—
Australia	—	—	—	—	—	—	—	—	—
Brazil 21/	512	544	—	2	2	—	35	38	—
Chile	—	—	—	—	—	—	—	—	—
South Africa	—	—	—	—	—	—	—	—	—
Uruguay	—	—	—	—	—	—	—	—	—
Total Southern Hemisphere	512	544	—	2	2	—	35	38	—
GRAND TOTAL	1,833	1,831	1,343	67	80	78	282	246	216

—Indicates zero, negligible, or not available.

1/ Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October–June in the Northern Hemisphere and April–December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. Forecasts for production, exports, and processing volumes in the United States for 1989/90 have been adjusted to reflect losses of the December 1989 freeze. Forecasts for Mexico in 1989/90 are based on pre-freeze conditions. 2/ Exports do not include the category "Other Citrus " which consists of bergamots, kumquats, and other non-identified varieties. 3/ Includes Swaziland. 4/ The crop year refers to harvest and marketing period. For oranges, tangerines, grapefruit, and limes this usually begins in the fall and extends through the spring. This corresponds roughly to October–June in the Northern Hemisphere and April–December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. For lemons, the harvest and marketing period usually begins in late summer and extends through the spring. This corresponds roughly to August–June in the Northern Hemisphere and February–December in the Southern Hemisphere. 5/ Tangerine production is small and is included with oranges. 6/ Includes small quantity of tangerines. 7/ Includes temples. 8/ Includes some fruit produced in Swaziland, Botswana, and Mozambique which is marketed through the South African Citrus Board. 9/ Clementines only. 10/ Mainly satsumas (also called mandarin or unshu mikan), but also including mandarin hybrids. 11/ Includes tangelos, which accounts for about half of combined tangerine and tangelo production. 12/ State of Sao Paulo only, which apparently accounts for over one-half of Brazil's production. About 120,000 tons of tangerines which are processed are included in the orange table. 3/ Includes small amount of limes. 14/ State of Sao Paulo only. 15/ Mostly limes but some sour oranges and other varieties. 16/ Citrons and sour oranges. 17/ Mostly bergamots. 18/ Sour oranges. 19/ Summer oranges (natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo). 20/ Limes 21/ Limes, State of Sao Paulo only, which apparently accounts for roughly 80 percent of Brazil's lime production. Small amount of lemon is included with Brazilian limes.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

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Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

PRODUCTION OF PROCESSED TOMATO PRODUCTS INCREASE IN 1989

Revised estimates for the production of tomatoes for processing in major producing countries show output the same as July 1989 estimates, at 18.1 million tons for 1989, an increase of 24 percent over the 1988 production of 14.7 million tons. Tight world supplies for tomato products and higher prices stimulated a large increase in plantings worldwide. Production in the United States rose almost 30 percent to an all time high production level of 8.6 million tons. Mediterranean Basin production (Europe, Turkey, and Israel) grew 22 percent, with the biggest increases coming from Turkey. Israel more than doubled its production of processing tomatoes in 1989 over 1988, with a record 320,000 tons. EC production reached 6.5 million tons, with Greece and Spain exceeding their quota limits. Mexican production increased 12 percent in 1989 and the forecast for the 1990 shows an increase of 15 percent. After several years of stagnation, Taiwanese production increased 6 percent in 1989 and is forecast to increase 10 percent in 1990.

PRODUCTION OF TOMATOES FOR PROCESSING IN SELECTED COUNTRIES
(Thousand Metric Tons)

COUNTRY	1987	1988	1989
United States	6,896	6,722	8,604
Canada	478	519	520
Mexico	272	282	317
Italy	3,100 1/	3,160	3,300
France	236	276	340
Greece	865 2/	1,005 3/	1,400 4/
Spain	743	746	850
Portugal	427	450	639
Turkey	900	1,150	1,600
Israel	178	136	320
Taiwan	278	207	220
TOTAL	14,372	14,653	18,110

1/ Includes 40,000 tons withdrawn from the market. 2/ Includes about 15,000 tons withdrawn from the market and 25,000 tons not delivered to processors. 3/ Includes 44,000 tons not delivered to processors. 4/ Includes 8,000 tons withdrawn from the market and approximately 100,000 tons not delivered to processors.

European Community

The 1989 pack of tomato paste and canned tomatoes increased 16 percent and 15 percent respectively. Ending stocks of both products are expected to rise in 1989 due to increased production compared to consumption and exports.
In 1989, the EC on a whole produced over its quota levels for tomatoes for processing, the first time since the quotas were introduced in the 1985/86 marketing year. (See July 1989 Horticultural Products Review for quota levels.) The EC production quotas are set for each producing member. For MY 1990/91 the quota may be changed from national to EC-wide quotas. Most member states view national quotas as more advantageous than an EC-wide quota since it enables member states to plan their production more efficiently.

Total Italian processing tomato production in 1989 is estimated at 3.3 million tons, a 4.4 percent increase over 1988. While area planted increased in 1989, disease and unfavorable weather conditions caused lower yields. The 1989 canned tomato pack is forecast at 1.05 million tons, up 15 percent from the previous year. Italian exports of canned tomatoes are not expected to increase proportionately to the increase in production due to the 100 percent tariff in the United States on canned tomatoes from the EC. Stocks of canned tomatoes are expected to climb from near zero to 60,000 tons at the end of the 1989 season.

Spain's 1989 pack of tomatoes for processing is estimated at 790,000 tons, 18 percent higher than the allowed EC quota of 667,000 tons. The largest increase came in the canned tomato pack, 228,000 tons in 1989 compared to 203,100 tons in 1988. The tomato paste pack suffered from a high mold count and low brix levels. Domestic demand for tomato products in Spain is growing, particularly for crushed tomatoes (tomato triturado) and tomato paste, due to an increased consumer preference for Italian style food.

For the first time since becoming a member of the EC, Portugal's tomato paste output nearly reached its EC quota level and processors had their first really profitable year in 1989. Production of tomato paste increased a whopping 35 percent. As in Spain, the paste pack had a high mold count and low brix levels. Exports are expected to absorb the increased production, with the USSR being the biggest buyer of Portuguese tomato paste (10,205 tons in 1988). Exports to the United States are not expected to increase over the 1988 level of 7,200 tons, due to the high mold count of the Portuguese paste.

The 1989 processing tomato crop in Greece totaled 1.4 million tons, the largest production on record and well above the EC quota of 1.013 million tons. The Government of Greece encouraged increased plantings of industrial tomatoes by giving low interest loans to growers, in the hope of reaching the production goal as set by the EC quota. In the past few years high summer temperatures prevented the Greek growers from reaching the quota level. Greek production of tomato paste increased 16 percent in 1989 to 195,000 tons while exports are only expected to increase 6 percent. Greek exports of tomato paste continue to be purchased mainly by other EC countries, with the Middle East as another major importing region. Ending stocks of paste are forecast to be 21,000 tons, up 9,000 tons from last year. Due to the mild summer weather the brix of tomatoes delivered for processing tomato paste was lower than normal, resulting in yields ranging from 6.3 to 6.9 kilograms of tomatoes per 1 kilogram of tomato paste, 28-30 TSS basis. This compared to previous year's yields from 5.3 to 6.0. Canned tomato production increased 20 percent in 1989 to 21,000 tons. Domestic consumption of canned tomatoes, including crushed tomatoes, has shown substantial increases in the past two years. Greece is changing from a net exporter to a net importer of canned tomatoes.

Turkey

Turkey produced a record production of tomato paste, 270,000 tons in marketing year 1988, and even higher production is forecast for marketing year 1989 - 280,000 tons. Attractive prices in both domestic and foreign markets encouraged the production to reach a record level. Turkey has become a major producer of tomato paste in recent years, second only to the United States and Italy. Although Turkey has no support price policy on tomatoes or tomato products, the government encourages paste exports by giving a subsidy of 50 dollars per ton to exporters. Tax rebates that had been paid to exporters were abolished as of January 1, 1989. MY 1988 exports reached an estimated 140,000 tons with the major buyer being Japan. Foreign demand for Turkish tomato paste is high and if the present trend continues, MY 1989 exports are forecast to reach 200,000 tons.

Israel

Production of tomatoes for processing more than doubled in MY 1989 to 320,000 tons. The tremendous increase in production bucks the trend of reduced production of processing tomatoes from 1983 to 1988. High prices for processing tomatoes due to world supply shortages and continued crop difficulties and low prices for cotton spurred many Israeli growers to plant tomatoes in 1989. Due to economies of scale, more and more of the Israeli processed tomato crop is being planted on large acreage. Also, the current shortage of available labor for hand picking is giving rise to increased mechanized harvesting. Production of all Israeli tomato products increased dramatically in 1989. Tomato paste production in 1989 almost doubled over 1988 production, 22,000 tons versus 11,500 tons. The canned tomato pack rose 41,000 tons to 53,000 tons. Tomato sauce production increased 22,000 tons to 41,000 tons, while tomato juice pack nearly doubled to 15,000 tons.

Israeli tomato product exports are expected to recover from the decline of the past five years. In the previous five years, with declining production, processors attempted to shift from paste to specialty sauces and peeled whole tomatoes. At the beginning of the 1980's most exports were aimed at the United States. In recent years, as the dollar weakened against the European currencies, exports were directed toward Europe. Exports to the United States of all Israeli tomato products are expected to increase dramatically in MY 1989.

Mexico

The 1989 Mexican tomato paste pack increased 17 percent to 43,300 tons. The elimination of the quota system on tomato plantings and stronger prices from tomato products brought about the increased pack. The 1990 pack is forecast to increase another 10,000 tons. Exports of tomato paste in 1989 are estimated at 39,000 tons with a forecast increase of 9,000 tons for 1990. The United States is the main market for Mexican tomato paste, followed by Canada and Japan.

Taiwan

Short supplies in the previous two marketing years have increased the MY 1989 (December 88 to March 1989) processing tomato production by 6 percent to 220,000 tons. Production for MY 1990 is expected to increase 10 percent to 242,000 tons. Short world supplies and high export prices provided incentive for Taiwanese canners to return to packing tomato products after several years of stagnation in the market. MY 1989 production of canned tomatoes increased 10 percent to 7,100 tons and the 1990 forecast is for only a slight increase of 3 percent, to 7,300 tons. Tomato paste production increased 12 percent in MY 1989 to 37,000 tons, but is expected to return to traditional levels in MY 1990.

Most of the increase production went to exports, with Japan being the principle market for Taiwan's canned tomato exports, taking half the total exports in 1988/89. Canned tomato exports to the United States, mainly dices and paste, increased almost 400 percent during the first 8 months of 1989 compare with the same period in 1988.

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TOMATO PASTE: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(PRELIMINARY 1988/89, FORECAST 1989/90, METRIC TONS NET WEIGHT, 28-30 PERCENT TSS BASIS)

MKTG YEAR[1]	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	ENDING STOCKS	TOTAL DISTRIBUTION
France								
1986/87	28,057	36,049	27,684	91,790	8,538	69,128	14,124	91,790
1987/88	14,124	31,071	39,150	84,345	4,635	74,663	5,047	84,345
1988/89	5,047	39,123	47,000	91,170	3,600	80,000	7,570	91,170
1989/90	7,570	48,500	40,000	96,070	4,500	81,000	10,570	96,070
Greece								
1986/87	110,000	125,300	0	235,300	120,000	25,000	90,300	235,300
1987/88	90,300	146,078	369	236,747	190,000	20,000	26,747	236,747
1988/89	26,747	167,542	3,701	197,990	165,000	20,000	12,990	197,990
1989/90	12,990	195,000	6,000	213,990	175,000	18,000	20,990	213,990
Italy								
1986/87	133,700	265,000	1,895	400,595	235,000	80,000	85,595	400,595
1987/88	76,000	220,000	24,000	320,000	230,000	80,000	10,000	320,000
1988/89	10,000	285,000	68,000	363,000	260,000	83,000	20,000	363,000
1989/90	20,000	310,000	40,000	370,000	270,000	80,000	20,000	370,000
Portugal								
1986/87	46,616	97,618	0	144,234	98,003	15,000	31,231	144,234
1987/88	31,231	77,800	0	109,031	95,100	12,000	1,931	109,031
1988/89	1,931	83,472	101	85,504	73,504	12,000	0	85,504
1989/90	0	112,303	0	112,303	100,303	12,000	0	112,303
Spain								
1986/87	20,000	56,000	500	76,500	43,200	30,000	3,300	76,500
1987/88	3,300	57,000	6,200	66,500	35,500	31,000	0	66,500
1988/89	0	71,000	7,900	78,900	43,200	35,700	0	78,900
1989/90	0	83,000	2,000	85,000	49,000	36,000	0	85,000
TOTAL EC								
1986/87	338,373	579,967	30,079	948,419	504,741	219,128	224,550	948,419
1987/88	214,955	531,949	69,719	816,623	555,235	217,663	43,725	816,623
1988/89	43,725	646,137	126,702	816,564	545,304	230,700	40,560	816,564
1989/90	40,560	748,803	88,000	877,363	598,803	227,000	51,560	877,363
Mexico								
1986/87	956	30,578	10	31,544	22,065	7,513	1,966	31,544
1987/88	1,966	35,033	46	37,045	27,554	9,491	0	37,045
1988/89	0	43,998	50	44,048	38,966	5,082	0	44,048
1989/90	0	53,607	0	53,607	48,167	5,440	0	53,607
Israel								
1986/87	10,000	13,400	0	23,400	8,000	8,000	7,400	23,400
1987/88	7,400	14,600	0	22,000	8,700	6,300	7,000	22,000
1988/89	7,000	11,500	0	18,500	7,200	6,300	5,000	18,500
1989/90	5,000	22,000	0	27,000	16,000	7,000	4,000	27,000
Turkey								
1986/87	55,636	100,000	10,129	165,765	109,470	47,000	9,295	165,765
1987/88	9,295	140,000	14,712	164,007	103,577	49,430	11,000	164,007
1988/89	10,000	210,000	1,399	221,399	115,643	55,756	50,000	221,399
1989/90	50,000	270,000	0	320,000	140,000	60,000	120,000	320,000
Taiwan								
1986/87	4,200	36,340	0	40,540	33,350	620	6,570	40,540
1987/88	6,570	32,420	0	38,990	32,025	620	6,345	38,990
1988/89	6,345	26,448	0	32,793	24,403	620	7,770	32,793
1989/90	7,770	29,160	0	36,930	30,480	620	5,830	36,930
TOTAL								
1986/87	408,209	783,314	40,208	1,231,731	703,728	280,188	247,815	1,231,731
1987/88	239,176	749,547	84,441	1,073,164	721,602	281,526	70,036	1,073,164
1988/89	69,036	929,118	128,147	1,126,301	720,104	302,867	103,330	1,126,301
1989/90	103,330	1,113,961	88,050	1,305,341	824,249	299,702	181,390	1,305,341

[1]Marketing years begin in July, except August for France and October for Mexico. The marketing year for Taiean begins in December preceding the first year indicated, e.g. "Taiwan 1989/90" represents product packed beginning in December 1988.

CANNED PEELED TOMATOES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(PRELIMINARY 1988/89, FORECAST 1989/90, METRIC TONS NET WEIGHT)
(Includes wedged, diced, crushed, and other non-concentrated products, as well as whole peeled, except for Taiwan.)

MKTG YEAR[1]	DELIV. TO PROCESSORS	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	ENDING STOCKS	TOTAL DISTRIBUTION
France									
1986/87	37,063	24,426	27,234	41,940	93,600	2,598	85,243	5,759	93,600
1987/88	51,513	5,759	42,024	43,886	91,669	1,538	83,171	6,960	91,669
1988/89	54,890	6,960	41,314	47,400	95,674	1,550	85,000	9,124	95,674
1989/90	59,800	9,124	45,000	45,000	99,124	2,500	85,000	11,624	99,124
Greece									
1986/87	20,000	3,675	16,000	200	19,875	2,000	14,000	3,875	19,875
1987/88	10,005	3,875	7,467	2,777	14,119	1,900	9,000	3,219	14,119
1988/89	16,193	3,219	11,154	3,153	17,526	596	12,000	4,930	17,526
1989/90	20,000	4,930	14,100	2,000	21,030	2,500	14,000	4,530	21,030
Italy									
1986/87	745,400	372,000	587,000	0	959,000	449,000	500,000	10,000	959,000
1987/88	1,240,000	10,000	976,000	731	986,731	505,000	420,731	61,000	986,731
1988/89	1,069,000	61,000	906,000	2,838	969,838	567,170	402,668	0	969,838
1989/90	1,261,000	0	1,045,000	2,500	1,047,500	587,500	400,000	60,000	1,047,500
TOTAL EC									
1986/87	802,463	400,101	630,234	42,140	1,072,475	453,598	599,243	19,634	1,072,475
1987/88	1,301,518	19,634	1,025,491	47,394	1,092,519	508,438	512,902	71,179	1,092,519
1988/89	1,140,083	71,179	958,468	53,391	1,083,038	569,316	499,668	14,054	1,083,038
1989/90	1,340,800	14,054	1,104,100	49,500	1,167,654	592,500	499,000	76,154	1,167,654
Taiwan									
1986/87	8,962	952	6,610	0	7,562	7,369	52	141	7,562
1987/88	7,645	141	6,559	5	6,705	6,397	65	243	6,705
1988/89	7,880	243	7,090	9	7,342	7,180	70	92	7,342
1989/90	8,200	92	7,300	10	7,402	7,150	75	177	7,402
Israel									
1986/87	30,000	5,200	27,300	0	32,500	21,000	6,500	5,000	32,500
1987/88	19,100	5,000	14,700	0	19,700	8,700	8,000	3,000	19,700
1988/89	15,200	3,000	11,800	0	14,800	7,800	7,000	0	14,800
1989/90	64,000	0	53,000	0	53,000	42,000	8,000	3,000	53,000
TOTAL									
1986/87	783,600	377,292	621,600	10	998,902	477,150	506,575	15,177	998,902
1987/88	1,268,062	15,952	997,310	731	1,013,993	521,069	428,783	64,141	1,013,993
1988/89	1,091,845	64,141	924,359	2,843	991,343	581,367	409,733	243	991,343
1989/90	1,332,880	243	1,105,090	2,509	1,107,842	636,680	408,070	63,092	1,107,842

[1]Marketing years begin in July, except for France, which is August. The marketing year for Taiwan begins in December preceding the first year indicated, e.g. "Taiwan 1989/90 represents product packed beginning in December 1988.

THE JAPANESE MARKET FOR MELONS

Summary

The market for melons in Japan was estimated to be 1.2 million metric tons in 1988, a decrease of 6 percent from 1987. However, spurred by the rise in the value of the yen, melon imports doubled in quantity from 1986 to 1988 to 20,485 metric tons. The United States is the principal foreign supplier of melons to Japan, primarily honeydew melons from California, accounting for 72 percent of imports by quantity in 1988.

Domestic Production and Market

Domestic Japanese melon production declined slightly between 1984 and 1988. Domestic production supplies over 98 percent of all annual melon consumption in Japan. Of this, open field production accounts for 96 percent of melon production, principally during the summer months, while greenhouse production accounts for the remaining 4 percent.

JAPANESE MELON PRODUCTION AND MARKETING

TYPE	APPEARANCE	PRODUCTION SEASON	SHIPMENTS IN 1987 (M. TONS)	AVG. 1988* WHOLESALE PRICE (YEN/KG)	SPECIAL FEATURES
Watermelon	Round, not oval like North American watermelons	May-August	863,300	131	65% of all melon consumption by weight in 1988
Prince Melon	Softball size with a light green exterior and interior	May-July	92,246	340	
Andes Melon	Smaller than a honeydew with a mottled green exterior	May-July	104,000	345	
Amus Melon	not available	June-July	66,000	329	
Musk Melon	Similar in size to honeydew with exterior like cantaloupes and light green flesh	Year round, peak in Dec., for gifts	44,900	793	Greenhouse produced; prestige gift item

* 128 Yen/US$1 in 1988
SOURCE: U.S. Agricultural Trade Office, Tokyo

Melons are regarded as a special fruit in Japan. The musk melon is considered a delicacy and is often priced at retail from 3,000 yen to 12,000 yen per melon. A substantial percentage of domestically produced melons are sold for gift purposes--traditional gifts in the summer and December gift seasons and get-well presents. As such, they carry prestige and are often sold though high class fruit shops or department stores.

Most melons in Japan pass from growers to local agricultural cooperatives, from which they are forwarded to wholesale markets around the country. Over 80 percent of melons are sold through auction on the wholesale market. The remainder is bought directly by the largest supermarket retailers.

DOMESTIC JAPANESE MELON PRODUCTION
(Metric Tons)

Description	1984	1985	1986	1987	1988
Watermelons	876,100	820,400	840,400	863,300	789,600
Other Open Field Melons*	332,400	329,100	338,900	366,000	361,300
Greenhouse Melons**	38,100	37,100	39,900	44,900	41,900
TOTAL	1,246,600	1,186,600	1,219,200	1,274,200	1,192,800

* Primarily Prince, Andes, and Amus melons. Variety specific production data for open field melons are not available.
** Primarily musk melon.
SOURCE: Japanese Ministry of Agriculture, Forestry and Fisheries

The Melon Import Market

Melon imports reached 20,485 metric tons in 1988, an increase of 27.3 percent over 1987, and almost double 1986 imports. Though still representing a small percentage of total Japanese melon consumption, imported melons have gradually increased market share, growing from 0.3 percent in 1984 to 1.7 percent in 1988. Melon imports have been aided by the strengthening of the yen, which has made import prices more competitive, and a growing interest in honeydew melons, which are not grown in quantity in Japan.

The United States is the dominant exporter of melons to Japan with a tonnage market share of 72 percent in 1988. The second largest exporter of melons to Japan is Mexico, with a 22 percent share in 1988. Mexico has surpassed the United States as primary supplier to the Japanese market in 1989. Mexico accounted for 55 percent of imports through August and is likely to maintain the number one position at the end of the year. Industry sources note that there is increasing Japanese investment in Mexican off-season melon (primarily honeydew) production that sells for a premium in Japan.

JAPANESE MELON IMPORTS BY COUNTRY

Country	1984	1985	1986	1987	1988	1989*
	Volume (M. Tons)					
United States	2,663	4,570	8,453	12,803	14,768	5,100
Mexico	1,047	1,202	1,470	2,595	4,558	6,927
New Zealand	150	297	438	696	648	447
China (PRC)	0	0	0	0	506	76
Other	0	5	3	0	5	21
Total	3,860	6,074	10,364	16,094	20,485	12,571
	Value (1,000 Yen**)					
United States	489,139	636,085	969,975	1,416,428	1,707,505	640,724
Mexico	315,668	450,186	386,564	554,810	1,026,438	1,521,498
New Zealand	115,647	207,842	307,446	432,337	421,337	275,046
China (PRC)	0	0	0	0	92,575	15,987
Other	0	1,913	2,430	0	2,454	4,039
Total	920,454	1,296,026	1,666,415	2,403,575	3,250,309	2,457,294

* Through August.
** Value is C.I.F.; Exchange rates (Yen/US$1): 1984--236; 1985--240; 1986--170; 1987--146; 1988--128; 1989--140.
SOURCE: Japanese Ministry of Finance

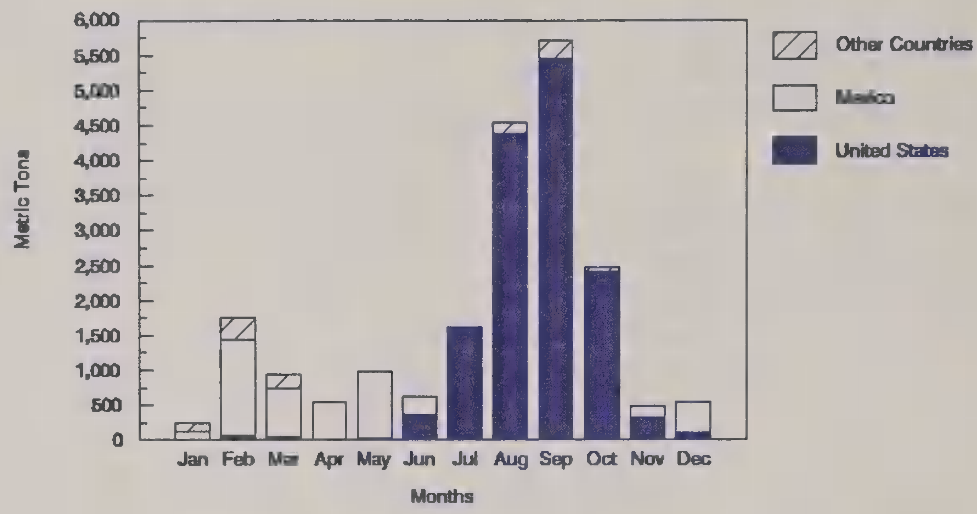
Most melon imports from the United States enter from August (the end of the Japanese production season) through October. As such, they come at the end of the Japanese shipping season. Mexican melons are imported largely between February and May, shortly before the main period of the Japanese harvest.

Most melons shipped from the United States are honeydews grown in California. Despite the steady growth in the Japanese melon market, forces of supply and demand have to be taken into account in analyzing the market. U.S. honeydews and Japanese melons compete for market share in late July and August--the onset of the California season and the wane of the Japanese production period. If the Japanese season is lengthened because of good weather, the beginning of the U.S. export season will be sluggish (as happened in the 1989 season).

Imported melons are sold primarily at supermarkets in pre-cut state. According to importers, the quality of the imported melons is very hard for consumers to judge from the outside. As a result, given the special nature of melons, retailers are reluctant to sell melons without first "demonstrating" the quality, i.e., the melons must be cut open.

There are an estimated 30 major importers of melons to Japan, among whom the big trading companies are the largest. Some of the major retail supermarket chains also import melons, however, their share of the total is estimated to be only around 10 percent. Melons are subject to a 10 percent import tariff. In addition, similar to all food products, a 3 percent sales tax is applied at the time of entry. Melons, like to all other imported fresh produce, must undergo an inspection for plant health at the time of entry to Japan. All imported fresh produce must be accompanied by a phytosanitary certificate issued by the proper authority of the exporting nation (the Animal and Plant Health Inspection Service in the United States).

JAPANESE MONTHLY MELON IMPORT, 1988



SOURCE: Japanese Ministry of Finance

Most imported melon products pass directly from importers to the customer without going to auction at wholesale markets. This is in contrast to domestically produced melons, most of which go through wholesale markets. The principal customers for imported melons are the large supermarket chains.

According to importers, as much as one-third of all melon imports are classified as off-grade, which means they are either sold at a discount or discarded. This poses financial risks for importers and reduces the appeal of importing. In the case of cantaloupes, spoilage is cited as the major problem. The heavy weight of watermelons, which increases transport costs, combined with the low retail prices, have kept many importers from actively promoting this item.

Melons often are sold individually wrapped or in combination with other fruits in a gift set. The most expensive varieties are often sold with their own box. Uniformity of melon size and exterior appearance is very important. Every effort should be made to ensure that high-grade product is supplied to the Japanese market.

1989 and Outlook

Overall melon imports through August 1989 are 12 percent greater than for the same period in 1988. This increase is, however, illusory as it is due to a surge in imports from Mexico and comes despite a drop in imports from the United States. The decrease in U.S. shipments also is evident in export data through September, which show a decrease of 31 percent from the same period in 1988, to 9,741 tons. Industry sources indicate that October 1989 shipments will also decrease as rain in late September knocked California out of the market.

The reduced levels of current year U.S. exports should not be taken as an indication of market softening. According to industry sources, the 1988 export surge should rather be viewed as an aberration. In 1988 'the game' started earlier in the year than normal. Japanese buyers came looking for melons in May (normally most shipments start in late July-early August) as the Japanese market was short. U.S. speculators moved in to try to serve this perceived increase in demand. Many grower/shippers sent melons to Japan that had not been grown specifically for that quality-conscious market (even field-packed melons were shipped to Japan). It should be noted that the exchange rate in 1988 was around 125 yen per dollar, the lowest level in decades, thus increasing the affordability of U.S. melons.

Moving into the main shipping season in late July 1988, prices were high, a lot of one-shot players were in the game, and supply outstripped demand. Suddenly the bottom fell out of the market, prices plummeted, and both exporters and importers were hurt.

UNITED STATES: MELONS EXPORTS TO JAPAN

Products	Years						
	1984	1985	1986	1987	1988:	1988*	1989*
Volume (m. tons)							
Cantaloupe	38	28	70	256	223:	213	173
Honeydew & other	3,772	5,386	9,122	13,977	15,089:	13,701	9,261
Watermelon	7	[illegible]	0	58	160:	132	308
Total	3,817	5,414	9,192	14,291	15,472:	14,046	9,742
Value ($)							
Cantaloupe	19,306	11,265	35,951	110,974	148,816:	139,306	105,793
Honeydew & other	2,701,136	3,751,368	5,420,177	7,558,975	9,275,739:	8,407,685	4,675,004
Watermelon	23,343	0	0	30,241	52,096:	35,347	86,214
Total	2,743,785	3,762,633	5,456,128	7,700,190	9,476,651:	8,582,338	4,867,011

* January through September

[illegible] U.S. Department of Commerce, Bureau of the Census

After the debacle of 1988, industry sources indicate that Japanese importers became much more cautious. Only established firms imported in 1989 and they dealt only with established grower/shippers. There was no early deal due to that caution and a better than average Japanese crop. Shipments in August and September matched 1987. In late September, though, it rained 3 inches (76 mm) and knocked California out of the market.

The prospect for increasing melon exports to Japan remain good into the 1990's. However, the market has matured and incredible leaps in shipment levels like those of the mid-2980's will be unusual. In order to continue market advancement, exporters must maintain and exceed present quality levels, grow melons specifically for the Japanese market, keep to high packing standards, and be aware of trends in supply and demand in the market.

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U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
OCT 89

COMMODITY AND COUNTRY		QUANTITY					VALUE (000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
CANADA		2,569	3,213	15,675	15,641	51,541	1,378	1,626	8,429	8,049	27,064
TAIWAN		6,740	9,269	10,341	14,571	46,040	3,242	4,800	5,226	7,385	23,268
HONG KONG		3,209	4,238	5,552	8,648	27,258	1,701	2,086	2,886	4,226	13,233
EC 12		2,668	2,988	3,898	4,504	24,291	1,443	1,380	2,094	2,079	12,287
UNITED KINGDOM		2,231	2,253	3,235	3,411	18,300	1,207	1,127	1,736	1,703	9,417
SWEDEN		217	1,041	219	1,315	14,466	104	362	111	417	6,031
OTHER		16,789	20,288	24,298	29,391	85,643	7,975	9,399	12,052	14,486	44,709
Subtotal:-----		32,192	41,037	59,984	74,069	249,238	15,843	19,652	30,798	36,643	126,591
FR AVOCADOS(OCT)	MT										
EC 12		517	392	517	392	3,491	648	508	648	508	4,477
UNITED KINGDOM		237	192	237	192	1,635	236	225	236	225	2,209
CANADA		105	145	105	145	1,613	174	188	174	188	2,509
JAPAN		1	2	1	2	1,242	5	7	5	7	1,705
FRANCE		0	24	0	24	768	0	29	0	29	935
NETHERLANDS		243	103	243	103	689	371	161	371	161	855
OTHER		83	3	83	3	866	128	4	128	4	1,164
Subtotal:-----		706	541	706	541	7,213	956	706	956	706	9,856
FR. PEARS(JUL)	MT										
CANADA		2,750	4,196	10,192	10,574	27,477	1,357	2,008	5,062	5,387	13,539
MEXICO		378	2,187	556	6,554	11,225	165	964	241	2,931	4,662
SWEDEN		776	1,105	776	1,615	10,602	362	369	362	586	4,480
OTHER		2,669	3,483	3,252	4,282	11,498	1,325	1,957	1,718	2,396	5,846
Subtotal:-----		6,572	10,971	14,776	23,025	60,802	3,208	5,298	7,383	11,299	28,526
FR GRAPES(JUN)	MT										
CANADA		10,261	12,136	51,849	44,917	73,786	7,528	10,818	44,044	40,351	63,116
HONG KONG		3,432	4,492	9,711	13,742	18,055	3,476	3,726	9,985	12,296	17,569
TAIWAN		4,076	4,491	7,492	9,907	12,762	3,995	4,295	7,183	9,481	12,160
OTHER		5,709	6,544	16,787	19,516	33,586	6,317	6,976	22,204	23,178	39,328
Subtotal:-----		23,477	27,663	85,838	88,082	138,188	21,316	25,814	83,416	85,306	132,173
FR KIWIFRUIT(OCT)	MT										
CANADA		404	860	404	860	4,885	392	860	392	860	4,994
TAIWAN		355	112	355	112	1,407	663	246	663	246	2,496
FINLAND		0	0	0	0	900	0	0	0	0	1,426
EC 12		0	0	0	0	679	0	0	0	0	1,009
NETHERLANDS		0	0	0	0	585	0	0	0	0	821
JAPAN		0	7	0	7	522	0	11	0	11	954
OTHER		11	46	11	46	1,708	11	79	11	79	2,268
Subtotal:-----		770	1,025	770	1,025	10,100	1,066	1,197	1,066	1,197	13,148
FR STRAWBRIS(JAN)	MT										
CANADA		159	462	9,180	10,134	9,367	355	827	19,000	18,473	19,421
JAPAN		628	653	2,890	3,315	3,027	3,327	3,375	12,889	13,658	13,623
EC 12		171	111	660	863	787	431	299	1,400	1,663	1,704
OTHER		33	43	719	1,718	730	82	96	1,795	3,508	1,835
Subtotal:-----		990	1,269	13,449	16,031	13,911	4,194	4,596	35,083	37,303	36,584
FR CHERRIES(MAY)	MT										
JAPAN		10	25	14,383	11,142	14,383	11	63	40,316	40,398	40,319
CANADA		51	95	5,559	6,981	5,763	56	119	6,693	9,232	6,891
EC 12		248	0	2,472	3,696	2,748	276	0	5,087	7,486	5,383
UNITED KINGDOM		13	0	1,986	3,028	1,988	19	0	4,496	6,275	4,499
OTHER		18	11	2,897	4,629	2,945	5	14	5,623	8,037	5,705
Subtotal:-----		328	131	25,311	26,447	25,839	348	197	57,720	65,153	58,298
FR ORNG INC TMPL(NOV)	MT										
JAPAN		1,774	3,403	115,387	118,765	115,387	1,169	3,032	74,346	80,986	74,346
CANADA		4,560	3,748	95,184	89,428	95,184	2,457	2,651	51,929	52,451	51,929
HONG KONG		5,544	6,924	78,137	101,958	78,137	2,923	3,912	39,603	51,432	39,603
OTHER		991	1,385	46,062	57,178	46,062	563	793	24,651	30,584	24,651
Subtotal:-----		12,868	15,460	334,770	367,329	334,770	7,113	10,388	190,528	215,454	190,528
FR GRPFRT(SEP)	MT										
JAPAN		3,145	12,536	5,314	14,848	259,109	1,775	7,008	2,984	8,439	132,282
EC 12		12,643	12,456	13,900	17,129	139,704	5,457	5,772	5,906	7,970	60,657
FRANCE		4,938	6,153	5,501	8,630	61,176	2,257	2,867	2,426	3,978	25,676
NETHERLANDS		5,255	2,540	5,828	3,979	41,095	2,193	1,302	2,418	2,014	16,682
TAIWAN		33	25	627	56	32,214	16	11	274	36	15,794
CANADA		2,333	2,085	3,488	3,599	27,077	1,089	1,375	1,657	2,363	13,841
OTHER		650	424	1,186	742	19,776	315	230	674	411	9,933
Subtotal:-----		18,802	27,526	24,515	36,375	477,880	8,652	14,397	11,494	19,220	232,508
FR TANGERINES(NOV)	MT										
CANADA		521	567	9,228	9,324	9,228	267	470	4,728	6,269	4,728
HONG KONG		0	0	3,297	119	3,297	0	0	2,934	43	2,934
EC 12		4	0	1,837	8,987	1,837	3	0	930	4,456	930
NETHERLANDS		4	0	860	4,370	860	3	0	436	1,949	436
OTHER		8	2	486	1,582	486	7	13	342	785	342
Subtotal:-----		533	569	14,848	20,012	14,848	276	482	8,934	11,553	8,934
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		1,638	366	3,402	2,479	9,013	1,518	483	3,344	2,487	9,119
TAIWAN		312	83	1,761	984	3,154	230	89	1,226	748	2,236
CANADA		157	97	925	455	1,755	158	78	837	416	1,577
OTHER		351	781	1,479	2,668	3,614	342	788	1,366	2,469	3,412
Subtotal:-----		2,458	1,326	7,566	6,586	17,536	2,248	1,438	6,773	6,119	16,344
CND PEARS(JUN)	MT										
JAPAN		25	49	45	56	221	30	61	56	70	276
CANADA		7	26	60	108	96	5	21	45	71	73
PANAMA		1	23	1	83	84	2	18	2	61	70
SAUDI ARABIA		33	30	40	40	71	30	29	38	38	69
EC 12		6	0	51	46	63	7	0	51	39	66
SINGAPORE		0	4	14	12	62	0	5	21	13	87
OTHER		41	28	177	252	434	41	18	177	228	447
Subtotal:-----		112	161	388	597	1,031	116	152	390	521	1,087

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
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COMMODITY AND COUNTRY		QUANTITY					VALUE (000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CND PNEAPL(JAN)	MT										
CANADA		1,027	1,159	4,737	4,688	6,331	783	792	3,510	3,176	4,686
EC 12		271	12	2,853	1,941	4,161	301	10	2,517	1,777	3,612
NETHERLANDS		91	12	907	318	1,097	119	10	844	274	1,040
GERMANY, FEDERAL		76	0	837	1,300	943	77	0	871	1,219	983
BELGIUM-LUXEMBOU		28	0	747	60	775	27	0	491	68	518
UNITED KINGDOM		0	0	197	166	754	0	0	145	108	508
OTHER		125	120	1,674	1,375	2,002	123	119	1,710	1,374	2,074
Subtotal:-----		1,423	1,290	9,264	8,004	12,495	1,206	921	7,737	6,327	10,373
FRT MIXTURES(JUN)	MT										
JAPAN		672	223	2,405	912	7,201	805	271	2,670	1,088	8,047
CANADA		474	160	1,800	907	4,758	484	144	1,773	796	4,659
PHILIPPINES		194	274	643	549	1,597	198	249	505	560	1,435
HONG KONG		144	101	879	364	1,433	146	99	936	396	1,515
SINGAPORE		147	139	416	809	1,403	144	159	428	823	1,411
OTHER		759	1,168	2,423	2,795	6,582	936	1,217	2,817	2,779	7,024
Subtotal:-----		2,391	2,064	8,565	6,337	22,973	2,713	2,13[illegible]	9,129	6,442	24,091
DRIED FRUIT											
DRD RAISINS(AUG)	MT										
EC 12		4,061	3,260	12,240	12,424	42,313	6,090	5,134	18,685	18,209	61,578
JAPAN		1,048	1,887	5,468	4,610	22,565	1,498	3,414	7,890	8,017	34,636
UNITED KINGDOM		1,600	1,059	5,728	6,558	21,005	2,335	1,833	8,378	9,328	29,488
GERMANY, FEDERAL		864	851	2,509	2,518	8,628	1,209	1,235	3,803	3,743	12,737
DENMARK		834	613	2,212	1,576	5,780	1,289	945	3,589	2,489	8,693
SWEDEN		951	997	2,938	2,926	5,401	1,546	1,827	4,965	5,097	8,932
OTHER		2,711	2,320	9,080	8,426	26,018	4,840	4,302	17,580	15,604	47,738
Subtot[illegible]l:-----		8,771	[illegible],463	29,725	2[illegible],3[illegible]7	96,296	13,974	14,678	49,120	46,927	152,883
DRD PRUNES(AUG)	MT										
EC 12		4,276	5,538	8,408	10,107	28,807	6,648	8,206	13,128	16,097	47,264
JAPAN		995	1,038	2,324	2,439	9,898	1,253	1,532	3,087	3,670	14,023
ITALY		1,306	2,067	3,007	3,549	8,728	1,909	2,736	3,973	5,341	13,832
GERMANY, FEDERAL		986	536	1,959	1,662	8,118	1,835	824	3,668	3,018	14,563
CANADA		283	368	1,085	924	3,883	470	645	1,808	1,533	6,212
OTHER		1,801	1,747	5,032	5,413	14,743	3,075	2,294	8,717	8,791	24,461
Subtot[illegible]l:-----		7,355	[illegible],690	16,849	18,883	57,331	11,446	12,678	26,741	30,091	91,[illegible]60
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
CANADA		5,545	7,420	71,235	61,569	78,872	3,286	3,765	40,429	32,469	45,111
EC 12		938	2,718	56,502	37,705	58,602	492	1,303	19,945	17,894	20,969
NETHERLANDS		215	436	21,246	10,196	21,575	141	218	7,143	4,567	7,358
JAPAN		650	1,050	15,238	21,772	15,387	318	524	7,382	12,185	7,471
GERMANY, FEDERAL		441	391	14,343	7,870	14,762	177	164	4,994	2,916	5,173
UNITED KINGDOM		240	390	12,281	3,777	13,328	148	215	4,551	2,157	5,034
OTHER		5,605	8,503	66,484	97,605	72,049	2,797	3,958	30,975	45,309	34,037
Subtot[illegible]l:-----		12,739	19,692	209,45[illegible]	218,919	224,910	6,893	[illegible],549	9[illegible],730	107,975	107,5[illegible]9
ORNG JU NTCNC(DEC)	KL										
EC 12		1,349	83	9,759	10,579	10,760	641	85	5,530	8,243	6,318
FRANCE		915	67	8,506	9,907	9,489	546	69	5,215	8,009	5,999
JAPAN		51	312	4,753	18,075	4,955	34	91	2,508	5,454	2,634
HONG KONG		133	92	2,343	764	2,511	50	20	635	231	673
LEEWARD-WINDWARD		158	237	1,480	1,903	1,613	47	66	502	511	531
KOREA, REPUBLIC		25	0	1,483	426	1,508	6	0	327	93	332
OTHER		496	561	7,386	8,145	7,856	167	231	2,484	3,077	2,667
Subtotal:-----		2,213	1,284	27,203	39,892	29,203	944	493	11,987	17,609	13,155
GRPFRT JU CNC (DEC)	KL										
JAPAN		1,061	464	39,110	23,521	39,590	610	290	19,839	15,840	20,144
EC 12		528	214	15,142	5,593	16,133	208	106	5,792	3,175	6,051
CANADA		660	743	10,907	9,163	11,448	327	434	5,444	4,759	5,747
GERMANY, FEDERAL		376	150	6,860	1,911	7,648	152	73	2,319	658	2,487
ISRAEL		0	0	5,952	484	5,952	0	0	2,258	337	2,258
NETHERLANDS		21	0	5,708	2,445	5,708	14	0	2,411	1,719	2,411
OTHER		300	282	6,810	5,712	7,078	180	166	3,204	3,100	3,352
Subtotal:-----		2,549	1,762	77,922	44,533	80,201	1,326	1,038	36,537	27,254	37,552
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
JAPAN		5	0	5	0	6,082	27	0	27	0	19,708
CANADA		11	117	11	117	4,900	30	258	30	258	10,415
EC 12		0	1	0	1	1,452	0	3	0	3	3,302
SWITZERLAND		0	0	0	0	1,241	0	0	0	0	2,571
OTHER		0	0	0	0	383	0	0	0	0	980
Subtotal:-----		16	118	16	118	14,059	57	261	57	261	36,976
FR ONIONS(OCT)	MT										
CANADA		3,746	2,699	3,746	2,699	42,808	997	719	997	719	11,439
JAPAN		7,059	7,158	7,059	7,158	31,860	1,951	1,624	1,951	1,624	8,278
TAIWAN		2,799	2,600	2,799	2,600	4,631	814	721	814	721	1,356
OTHER		2,463	3,676	2,463	3,676	12,548	754	981	754	981	4,087
Subtotal:-----		16,067	16,133	16,067	16,133	91,848	4,516	4,046	4,516	4,046	25,160
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
JAPAN		5,121	4,237	10,464	7,815	41,035	4,714	4,304	9,387	7,633	36,141
EC 12		3,826	5,900	7,963	13,135	25,371	2,918	4,412	6,136	10,324	18,857
GERMANY, FEDERAL		1,883	3,159	4,386	6,577	10,855	1,430	2,406	3,447	5,377	8,223
TAIWAN		851	809	2,063	2,639	9,267	621	694	1,519	1,977	7,334
UNITED KINGDOM		1,027	1,534	1,684	3,167	8,889	718	1,058	1,186	2,199	6,311
OTHER		2,025	3,516	4,445	7,769	19,404	1,577	2,599	3,273	5,588	14,393
Subtotal:-----		11,823	14,463	24,935	31,357	95,077	9,830	12,009	20,315	25,523	76,726
CND TOM PAS(JUL)	MT										
CANADA		1,429	1,177	3,751	3,583	6,789	1,309	1,193	3,130	3,338	5,701
JAPAN		307	520	1,039	1,948	1,225	321	613	973	2,205	1,123
KOREA, REPUBLIC		68	500	313	802	541	66	666	307	1,046	530
OTHER		56	496	601	1,900	1,488	66	472	713	1,712	1,752
Subtotal:-----		1,859	2,692	5,704	8,232	10,042	1,763	2,944	5,123	8,302	9,107

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
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COMMODITY AND COUNTRY		QUANTITY					VALUE (000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CND TOM SAUCE(JUL)	MT										
EC 12		0	5,780	1,114	6,079	8,094	0	3,834	1,230	4,132	8,164
UNITED KINGDOM		0	361	1,114	605	6,920	0	356	1,230	613	7,257
CANADA		74	578	541	2,001	3,273	47	337	328	1,181	1,966
JAPAN		113	104	702	615	2,043	105	125	655	585	1,686
MEXICO		17	85	96	845	1,907	12	98	70	604	1,256
NETHERLANDS		0	183	0	183	1,027	0	130	0	130	802
OTHER		130	499	410	1,477	2,424	127	517	373	1,559	2,106
Subtotal:-----		334	7,054	2,862	11,025	17,740	291	4,915	2,656	8,064	15,178
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		3,041	2,685	10,463	10,286	33,762	2,620	2,307	8,711	9,049	27,616
EC 12		662	848	2,327	2,499	6,742	370	519	1,255	1,657	4,156
AUSTRALIA		330	647	1,586	2,183	5,152	192	500	956	1,374	3,085
UNITED KINGDOM		576	338	2,008	1,228	5,073	317	230	1,058	898	3,195
OTHER		371	896	1,114	2,478	7,254	236	638	757	1,677	4,270
Subtotal:-----		4,403	5,076	15,490	17,446	52,909	3,418	3,964	11,678	13,758	39,127
FZN F FRY(JUL)	MT										
JAPAN		10,227	7,790	35,872	32,106	105,442	7,027	5,462	25,844	22,686	73,922
HONG KONG		509	1,033	1,951	4,284	9,820	307	372	1,221	1,639	4,117
OTHER		1,761	3,135	5,966	10,279	22,516	1,408	1,825	4,593	5,927	14,672
Subtotal:-----		12,497	11,958	43,789	46,668	137,778	8,741	7,658	31,658	30,252	92,711
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
INDIA		825	202	2,408	1,293	5,816	1,655	564	4,831	3,029	11,657
EC 12		1,448	120	2,309	423	3,194	2,199	146	3,713	520	6,155
JAPAN		205	287	406	1,233	2,322	600	822	1,044	3,712	6,614
NETHERLANDS		1,055	0	1,175	0	1,212	1,587	0	1,887	0	2,022
GERMANY, FEDERAL		64	61	386	180	879	131	58	784	251	2,398
OTHER		391	523	967	950	2,917	923	1,281	2,191	2,338	6,765
Subtotal:-----		2,870	1,155	6,089	3,923	14,248	5,377	2,864	11,779	9,651	31,192
ALMND SH/PREP(JUL)	MT										
EC 12		15,116	7,246	50,128	30,339	99,161	44,433	23,348	152,195	98,875	304,850
GERMANY, FEDERAL		7,621	3,778	26,740	16,007	49,611	21,917	11,873	80,309	52,507	151,289
JAPAN		3,089	3,100	7,944	8,801	22,266	10,178	9,490	26,384	26,892	71,075
UNITED KINGDOM		1,541	888	5,860	4,153	13,082	4,895	2,960	18,694	13,873	41,336
UNION OF SOVIET		0	2,200	7,999	2,200	12,999	0	1,760	22,903	1,760	40,650
FRANCE		1,684	927	5,666	4,426	12,040	4,971	3,109	17,512	13,523	37,527
OTHER		4,073	4,790	14,502	17,488	37,025	13,191	15,334	46,558	55,830	116,039
Subtotal:-----		22,278	17,461	80,574	59,200	171,452	67,802	50,408	248,040	184,792	532,615
WALNUTS SH(AUG)	MT										
EC 12		918	1,541	1,462	2,113	3,869	1,986	3,366	3,167	4,546	9,589
JAPAN		160	395	382	596	2,976	639	635	1,319	1,215	6,261
CANADA		57	366	388	566	1,269	167	408	698	699	2,311
GERMANY, FEDERAL		227	265	585	689	1,229	395	756	911	1,372	1,973
SPAIN		126	867	159	917	1,167	364	1,780	497	1,995	3,698
AUSTRALIA		169	146	282	374	1,009	669	562	1,037	973	3,508
OTHER		458	588	714	1,207	3,040	1,477	1,427	2,239	3,095	8,475
Subtotal:-----		1,761	3,035	3,228	4,855	12,162	4,939	6,398	8,460	10,528	30,144
WALNUTS UNSH(AUG)	MT										
EC 12		23,095	29,128	23,821	31,354	39,545	36,227	48,148	37,323	51,644	61,709
GERMANY, FEDERAL		9,435	12,261	9,585	13,220	13,692	15,104	19,722	15,330	21,250	21,390
SPAIN		7,931	8,516	8,399	9,328	12,868	11,907	14,885	12,620	16,182	19,987
ITALY		3,175	3,000	3,208	3,132	6,155	5,022	5,309	5,072	5,506	9,519
NETHERLANDS		1,133	2,301	1,133	2,360	2,624	1,761	3,690	1,761	3,785	4,380
OTHER		2,007	2,488	3,223	2,667	6,663	3,689	4,552	5,803	4,924	12,049
Subtotal:-----		25,102	31,616	27,044	34,021	46,208	39,916	52,700	43,126	56,567	73,758
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		32	23	124	911	5,240	139	74	550	2,502	11,168
CANADA		13	16	59	67	2,912	69	73	289	361	10,579
EC 12		0	0	0	0	1,067	0	0	0	0	2,562
GERMANY, FEDERAL		0	0	0	0	987	0	0	0	0	2,188
OTHER		3	34	224	49	1,446	11	1,008	1,084	1,062	7,189
Subtotal:-----		48	73	407	1,027	10,666	219	1,155	1,923	3,925	31,499
HOP EXTRACT(SEP)	MT										
EC 12		26	20	97	58	810	223	226	1,163	686	7,810
MEXICO		131	312	175	312	705	1,960	1,690	2,627	1,690	13,822
CANADA		9	39	20	54	525	91	364	174	483	3,880
BRAZIL		50	6	64	13	460	329	62	454	132	3,250
COLOMBIA		0	0	0	0	313	0	0	0	0	3,602
NETHERLANDS		10	0	15	22	292	39	0	76	192	2,464
OTHER		23	166	91	253	847	306	1,652	1,295	2,799	10,580
Subtotal:-----		240	542	448	689	3,662	2,909	3,993	5,712	5,790	42,945
HOPS,NSPF(SEP)	MT										
EC 12		216	151	292	210	658	780	894	1,359	1,313	2,772
GERMANY, FEDERAL		81	17	135	33	471	357	50	865	166	2,136
CANADA		88	48	91	63	264	317	249	326	350	937
UNITED KINGDOM		134	45	157	45	162	423	200	494	200	532
COLOMBIA		0	0	0	0	154	0	0	0	0	856
BRAZIL		12	0	34	5	111	30	0	104	18	370
OTHER		14	0	14	0	87	139	3	139	3	460
Subtotal:-----		329	200	430	277	1,273	1,266	1,145	1,929	1,683	5,394
WINE											
GRP WINE(JAN)	KL										
EC 12		1,347	2,242	16,185	17,821	18,285	1,842	2,705	23,764	24,839	27,064
CANADA		1,801	1,590	13,004	17,522	15,080	1,364	1,673	10,956	15,898	13,078
JAPAN		1,094	1,737	10,696	12,852	12,503	1,595	2,787	18,045	18,376	20,480
UNITED KINGDOM		833	1,126	10,776	10,357	11,872	1,155	1,635	15,337	14,991	17,044
SWEDEN		356	5	2,565	2,916	3,013	452	10	2,458	3,402	3,001
OTHER		970	1,242	8,706	11,419	10,503	1,644	1,842	13,282	16,065	16,032
Subtotal:-----		5,569	6,817	51,156	62,530	59,384	6,898	9,017	68,504	78,579	79,655

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COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	VALUE (000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
CANADA		7,447	8,407	15,321	13,763	51,429	2,285	1,874	4,779	3,688	17,489
NEW ZEALAND		0	0	3,294	5,277	21,383	0	0	2,114	1,987	16,847
CHILE		0	0	628	399	27,219	0	0	205	139	8,503
OTHER		0	1,395	4,422	6,731	16,105	0	1,004	1,737	2,907	6,253
Subtotal:-----		7,447	9,801	23,665	26,170	116,135	2,285	2,879	8,835	8,721	49,091
FR BANANA(JAN)	MT										
HONDURAS		45,069	23,042	520,251	449,429	607,685	13,666	7,270	155,337	141,315	181,712
ECUADOR		63,692	71,888	641,954	702,138	757,341	14,569	17,585	146,294	170,691	172,743
COSTA RICA		52,232	64,471	487,461	535,562	595,130	14,966	20,142	135,194	159,653	166,867
COLOMBIA		37,188	49,144	361,802	384,354	446,852	10,203	14,061	98,595	104,975	122,192
OTHER		38,548	50,028	404,543	362,201	466,904	10,446	14,478	116,056	102,394	133,895
Subtotal:-----		236,728	258,573	2,416,011	2,433,683	2,873,912	63,851	73,536	651,475	679,028	777,409
FR STRAWBRIS(JAN)	MT										
MEXICO		134	8	14,530	12,937	15,933	115	13	12,582	12,323	14,694
OTHER		122	218	747	1,496	1,943	222	545	1,056	2,052	3,669
Subtotal:-----		256	225	15,276	14,433	17,876	337	558	13,638	14,375	18,363
FR ORANGES(NOV)	MT										
EC 12		0	0	6,833	1,675	6,833	0	5	5,908	1,899	5,908
SPAIN		0	0	6,825	1,081	6,825	0	0	5,895	878	5,895
MEXICO		781	189	8,428	986	8,428	150	42	1,576	241	1,576
OTHER		163	25	7,254	5,084	7,254	39	10	2,272	1,857	2,272
Subtotal:-----		945	214	22,514	7,800	22,514	188	57	9,756	4,070	9,756
FR GRAPE(JUN)	MT										
CHILE		0	0	26	149	247,233	0	0	15	142	184,316
MEXICO		0	0	20,090	13,435	32,411	0	0	26,973	16,911	41,608
OTHER		3,830	642	15,889	4,092	16,250	777	279	2,893	1,101	3,147
Subtotal:-----		3,830	642	36,005	17,677	295,894	777	279	29,881	18,155	229,071
FR MANGO(JAN)	MT										
MEXICO		49	12	27,169	43,923	27,169	49	2	24,746	37,042	24,746
OTHER		31	40	7,377	8,036	7,478	28	23	4,075	4,960	4,131
Subtotal:-----		80	52	34,546	51,959	34,646	77	25	28,822	42,002	28,877
FR CANTLPE(MAY)	MT										
MEXICO		345	55	23,857	39,128	128,537	78	11	6,848	14,696	44,690
OTHER		17	29	3,708	9,528	68,496	3	5	926	2,293	18,203
Subtotal:-----		362	84	27,565	48,656	197,033	82	16	7,774	16,989	62,893
FR MELON,OT(MAY)	MT										
MEXICO		27	500	10,893	15,044	53,999	13	215	2,700	6,105	14,764
COSTA RICA		0	0	69	391	9,081	0	0	43	165	4,446
OTHER		69	0	3,666	4,047	34,259	41	0	1,250	1,202	9,841
Subtotal:-----		96	523	14,627	19,519	97,338	54	224	3,993	7,487	29,051
FR PEARS(JUL)	MT										
JAPAN		2,085	1,252	3,154	2,460	3,179	4,996	2,975	7,515	5,819	7,569
CHILE		0	0	0	0	20,552	0	0	0	0	6,765
ARGENTINA		0	0	430	0	12,332	0	0	217	0	4,993
OTHER		186	259	348	570	4,023	400	581	503	678	5,624
Subtotal:-----		2,271	1,510	3,932	3,030	40,085	5,397	3,556	8,234	6,497	24,950
FR PINAPLE(JAN)	MT										
COSTA RICA		2,886	5,532	35,052	45,847	42,617	1,536	3,325	17,331	24,834	21,372
HONDURAS		2,018	815	20,700	11,551	24,402	612	255	5,460	3,669	6,589
OTHER		1,034	2,456	12,752	24,373	14,719	186	616	1,994	5,938	2,355
Subtotal:-----		5,938	8,803	68,503	81,772	81,738	2,334	4,196	24,786	34,441	30,316
FR RASPBRY(JAN)	MT										
CANADA		45	9	10,843	7,978	10,845	87	45	15,164	12,026	15,166
CHILE		0	0	611	928	786	0	0	2,283	2,770	2,951
OTHER		4	0	39	30	57	17	0	191	76	271
Subtotal:-----		48	9	11,494	8,937	11,687	104	45	17,637	14,872	18,388
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EC 12		2,480	0	22,128	0	25,495	2,184	0	19,564	0	22,566
SPAIN		2,480	0	22,077	0	25,441	2,184	0	19,523	0	22,517
KOREA, REPUBLIC		236	0	9,477	0	9,965	265	0	10,901	0	11,440
OTHER		856	0	10,012	0	11,726	786	0	9,746	0	11,289
Subtotal:-----		3,573	0	41,617	0	47,187	3,235	0	40,211	0	45,296
CND BLK OLV(NOV)	MT										
EC 12		242	31	5,032	720	5,032	369	62	5,661	1,241	5,661
GREECE		201	22	2,455	398	2,455	311	34	3,630	617	3,630
SPAIN		12	2	2,448	238	2,448	13	5	1,842	388	1,842
OTHER		19	3	103	19	103	6	6	102	38	102
Subtotal:-----		261	36	5,134	760	5,134	375	71	5,763	1,340	5,763
CND GRN OLV(NOV)	MT										
EC 12		661	0	10,895	1,770	10,895	980	0	14,125	2,496	14,125
SPAIN		562	0	9,485	1,636	9,485	803	0	11,955	2,250	11,955
OTHER		50	0	1,629	370	1,629	44	0	1,262	135	1,262
Subtotal:-----		712	0	12,524	2,140	12,524	1,023	0	15,387	2,632	15,387
CND PEACH(JUN)	MT										
EC 12		3,652	3,909	6,019	8,332	32,466	2,378	2,556	3,771	5,157	21,091
GREECE		3,302	3,574	4,971	7,784	26,610	2,111	2,268	3,003	4,724	16,992
CHILE		258	631	4,279	6,561	9,413	183	409	3,086	4,698	6,540
OTHER		206	121	1,559	2,884	3,180	122	44	777	1,556	1,562
Subtotal:-----		4,116	4,661	11,856	17,776	45,060	2,683	3,009	7,634	11,410	29,193
CND PINAPLE(JAN)	MT										
THAILAND		8,585	0	109,531	77,635	128,976	4,930	0	64,431	44,256	75,492
PHILIPPINES		7,780	0	75,393	54,953	93,472	4,705	0	48,396	33,089	60,025
OTHER		1,931	0	22,104	22,089	25,998	1,124	0	15,021	13,467	17,284
Subtotal:-----		18,296	0	207,028	154,676	248,446	10,759	0	127,848	90,812	152,800
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		995	937	1,538	1,640	5,178	1,944	1,810	3,215	3,221	10,988
NEW ZEALAND		196	0	602	497	1,317	402	0	1,272	1,036	2,904
OTHER		86	40	221	211	592	251	228	653	943	1,766
Subtotal:-----		1,277	977	2,361	2,348	7,086	2,596	2,038	5,141	5,200	15,658
DATES(SEP)	MT										
PAKISTAN		73	68	194	163	6,308	84	75	188	199	5,412
CHINA (MAINLAND)		9	4	15	184	2,159	8	5	16	210	2,226
OTHER		60	93	81	192	1,355	82	106	140	240	1,641
Subtotal:-----		143	165	290	539	9,822	174	186	344	649	9,279

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
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COMMODITY AND COUNTRY		QUANTITY					VALUE (000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
DRD FIG(SEP)	MT										
EC 12		1,180	1,032	1,523	1,487	2,257	1,937	1,790	2,526	2,621	3,691
GREECE		1,150	1,015	1,417	1,468	2,114	1,880	1,747	2,335	2,573	3,444
OTHER		343	313	485	333	785	574	475	738	498	1,160
Subtotal:------		1,524	1,344	2,008	1,819	3,042	2,511	2,265	3,264	3,120	4,852
DRD RAISIN(AUG)	MT										
MEXICO		1,015	1,096	2,431	2,920	4,913	825	994	2,138	2,527	4,545
CHILE		276	260	934	1,009	3,315	254	208	860	795	2,909
OTHER		289	100	589	627	1,645	310	99	621	737	1,734
Subtotal:------		1,580	1,456	3,955	4,557	9,872	1,389	1,302	3,619	4,059	9,188
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EC 12		37,426	13,715	101,368	42,339	416,949	8,987	3,320	24,123	9,607	93,927
GERMANY, FEDERAL		17,949	9,799	59,212	27,751	252,886	4,115	2,125	13,576	5,871	55,361
ARGENTINA		29,689	20,843	103,133	104,674	231,170	5,718	3,318	20,179	18,984	44,007
OTHER		22,788	20,081	73,854	76,078	314,196	5,283	4,659	17,607	16,128	65,761
Subtotal:------		89,903	54,638	278,355	223,091	962,315	19,987	11,298	61,910	44,718	203,695
FCOJ(DEC)	KL										
BRAZIL		152,598	121,657	1,162,746	715,190	1,341,527	58,067	32,546	392,750	228,596	459,167
OTHER		8,919	3,256	209,779	172,808	216,684	3,183	1,012	73,044	58,555	75,543
Subtotal:------		161,517	124,913	1,372,526	887,998	1,558,211	61,249	33,558	465,794	287,151	534,710
GRAPE JU(JAN)	KL										
ARGENTINA		5,432	4,677	22,709	38,617	28,448	1,052	873	4,406	7,780	5,661
BRAZIL		814	516	8,450	11,327	10,224	219	168	2,140	3,687	2,631
OTHER		329	684	4,064	3,617	4,405	120	357	1,932	1,572	2,240
Subtotal:------		6,575	5,876	35,222	53,560	43,077	1,391	1,397	8,478	13,039	10,532
PNEAPL JUCN(JAN)	KL										
PHILIPPINES		6,770	7,852	77,279	89,361	91,123	1,176	1,589	13,838	15,973	16,090
THAILAND		3,064	4,025	72,265	88,989	83,248	438	625	12,138	14,771	13,765
OTHER		1,666	1,782	21,110	12,708	23,155	343	333	4,098	2,388	4,470
Subtotal:------		11,501	13,659	170,654	191,059	197,525	1,956	2,547	30,074	33,133	34,325
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		1,959	2,043	21,400	26,293	25,225	576	601	6,301	7,731	7,426
JAPAN		0	0	3,228	1,650	3,228	0	0	1,947	794	1,947
OTHER		114	185	1,067	3,918	1,288	54	82	411	1,380	523
Subtotal:------		2,073	2,227	25,695	31,861	29,741	630	682	8,659	9,904	9,896
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		546	37	24,221	17,004	24,755	294	25	13,790	10,466	14,077
OTHER		128	166	4,382	2,682	4,531	110	142	3,122	2,042	3,246
Subtotal:------		674	203	28,604	19,686	29,286	403	166	16,912	12,508	17,323
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		9	22	9	22	11,537	20	15	20	15	11,421
OTHER		355	11	355	11	2,167	252	37	252	37	1,614
Subtotal:------		364	33	364	33	13,704	272	53	272	53	13,034
FR CARROT(OCT)	MT										
CANADA		8,969	7,498	8,969	7,498	35,241	2,091	1,493	2,091	1,493	7,705
MEXICO		192	105	192	105	16,946	27	20	27	20	3,581
OTHER		210	7	210	7	1,211	178	7	178	7	1,019
Subtotal:------		9,372	7,610	9,372	7,610	53,398	2,296	1,520	2,296	1,520	12,305
FR CABBAGE(OCT)	MT										
CANADA		2,048	3,245	2,048	3,245	16,571	411	594	411	594	3,564
OTHER		15	0	15	0	3,944	4	0	4	0	876
Subtotal:------		2,063	3,245	2,063	3,245	20,515	415	594	415	594	4,441
FR CELERY(OCT)	MT										
MEXICO		0	0	0	0	12,578	0	0	0	0	3,378
CANADA		1,003	585	1,003	585	5,211	296	136	296	136	1,481
OTHER		3	64	3	64	1,306	3	12	3	12	256
Subtotal:------		1,006	649	1,006	649	19,095	299	148	299	148	5,115
FR CUCMBR(OCT	MT										
MEXICO		1,401	2,208	1,401	2,208	181,253	559	788	559	788	74,086
OTHER		182	253	182	253	11,292	171	319	171	319	5,425
Subtotal:------		1,583	2,461	1,583	2,461	192,545	730	1,107	730	1,107	79,511
FR CAULFLWR(OCT)	MT										
MEXICO		0	92	0	92	5,065	0	60	0	60	1,115
CANADA		224	431	224	431	1,369	68	145	68	145	436
OTHER		16	0	16	0	188	11	0	11	0	122
Subtotal:------		240	523	240	523	6,621	79	204	79	204	1,673
FR GARLIC(OCT)	MT										
MEXICO		3	4	3	4	8,216	2	14	2	14	5,497
ARGENTINA		0	0	0	0	2,716	0	0	0	0	2,751
OTHER		51	1,416	51	1,416	2,839	81	1,216	81	1,216	3,577
Subtotal:------		54	1,420	54	1,420	13,771	83	1,231	83	1,231	11,825
FR ONION(OCT)	MT										
MEXICO		2,463	3,331	2,463	3,331	139,857	2,273	3,386	2,273	3,386	59,929
OTHER		1,226	2,034	1,226	2,034	17,860	482	819	482	819	6,366
Subtotal:------		3,689	5,365	3,689	5,365	157,717	2,755	4,205	2,755	4,205	66,295
FR PEPPERS(OCT)	MT										
MEXICO		1,525	2,926	1,525	2,926	123,744	782	2,516	782	2,516	81,779
EC 12		453	742	453	742	6,653	914	1,946	914	1,946	17,958
NETHERLANDS		441	731	441	731	6,509	888	1,918	888	1,918	17,631
OTHER		252	431	252	431	2,684	149	405	149	405	3,285
Subtotal:------		2,229	4,099	2,229	4,099	133,080	1,846	4,867	1,846	4,867	103,022
FR SEED POT(OCT)	MT										
CANADA		282	203	282	203	70,382	42	46	42	46	12,940
OTHER		14	0	14	0	139	4	0	4	0	34
Subtotal:------		296	203	296	203	70,521	46	46	46	46	12,974
FR TBL POT(OCT)	MT										
CANADA		15,761	19,945	15,761	19,945	213,997	2,803	3,662	2,803	3,662	48,808
OTHER		0	9	0	9	861	0	11	0	11	177
Subtotal:------		15,761	19,954	15,761	19,954	214,858	2,803	3,672	2,803	3,672	48,985
FR TOMATO(OCT)	MT										
MEXICO		19,224	28,714	19,224	28,714	358,265	6,532	13,548	6,532	13,548	204,708
OTHER		210	349	210	349	7,586	212	383	212	383	7,443
Subtotal:------		19,434	29,063	19,434	29,063	365,851	6,744	13,931	6,744	13,931	212,151

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